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ABSTRACT

A case study of three linking agents in the National Institute of Education's Research and Development Program is presented. The study was based on interviews and project documentation. The Consortium Project employed six staff members known as linking agents. Each agent worked with five schools over a three-year period, helping them to select and implement new programs in response to identified needs for improvement. This case study, focused on three of the project's linkers, analyzes their prior experiences, documents their work on the projects, and attempts to explain how they became important partners in the school improvement efforts of 12 schools. (Author/JD)

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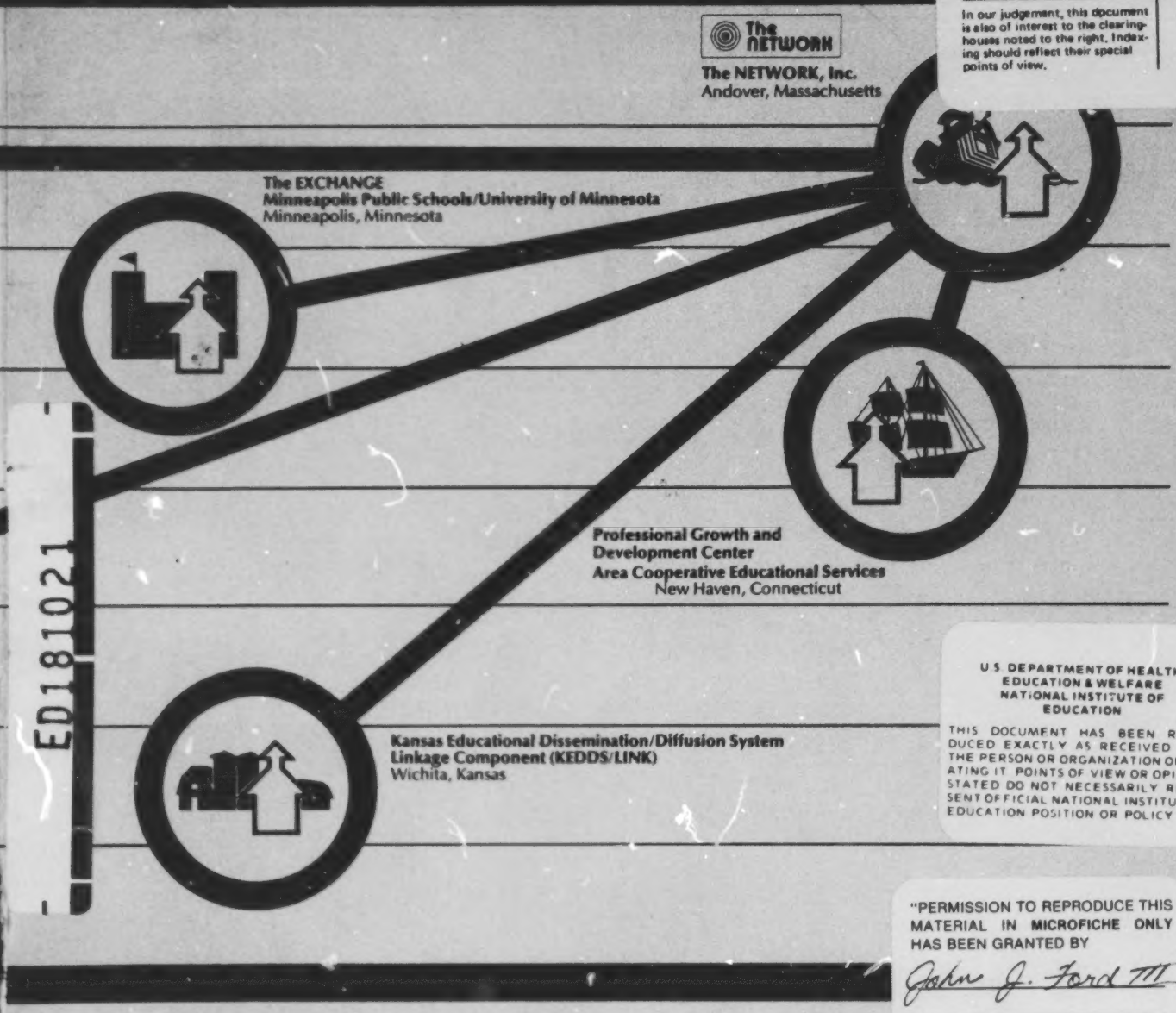

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CONSORTIUM REPORT SERIES:

THE "INSIDE" OUTSIDERS: A STUDY OF THREE CONSORTIUM LINKING AGENTS

SP015542

THE RESEARCH & DEVELOPMENT UTILIZATION PROGRAM

Overview

In 1976 the National Institute of Education sponsored a multi-year program designed to help schools take better advantage of educational research and development. The NETWORK, Inc., working with subcontracts to

Far West Laboratory for Educational Research and Development
San Francisco, California

KEDDS/LINK System
Wichita, Kansas

Yakima Public Schools
Yakima, Washington

Area Cooperative Educational Services Center
New Haven, Connecticut

The Minneapolis Public Schools/ University of Minnesota Teacher Center
Minneapolis, Minnesota

was one of seven RDU contractors. Although the seven RDU projects were chosen to represent a variety of strategies for working with schools, each project's overall approach shared the following features:

- Direct assistance to staff and community members
- Linking agents to coordinate services and work with select staff
- Team problem solving among local teachers, administrators, and others
- Access to services and resources from several sources
- Individual project documentation and research

The Consortium Project

Linking agents, housed in each of the subcontracting agencies and at The NETWORK, worked directly with the faculty and administration in thirty schools for a three year period. The linking agents followed a sequential problem solving model which resulted in groups at each school defining problems, developing criteria for reviewing potential solutions, selecting and implementing new programs, and evaluating outcomes.

Staff members in the Project's Linker Support Component provided each linker with resources, training, and consultation at regular intervals throughout the life of the project. At the same time members of the Research Component, using case studies, documented and analyzed activities at all levels of the project -- school, linking agency, interagency. The products of The Consortium were developed by one of these two components -- Linker Support or Research -- and comprise The Consortium Report Series.

(Continued on inside back cover)

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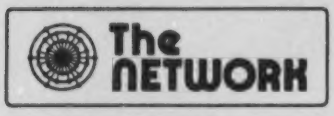
THE "INSIDE" OUTSIDERS: A STUDY OF THREE CONSORTIUM LINKING AGENTS

by

Beverly Loy Taylor, Ph.D
Center for Policy Research

A Publication of



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Andover, MA 01810

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PREFACE TO THE CONSORTIUM REPORT SERIES

There are several indications that the R&D Utilization Program was a complex undertaking. There have been attempts to help schools become better problem solvers, thereby introducing change as an appropriate response to problematic conditions, and there have been attempts to help schools apply existing R&D. However, RDU was an explicit attempt to introduce change in schools through group problem solving and the application of existing educational R&D.

RDU was also structurally complex. Rarely, for example, are programs developed that both fund an activity and provide the wherewithal to study it. Typically, contractors and grantees of research projects are told outright that funds are for research purposes and not for operational components of the phenomenon being studied, while service projects and demonstration programs allocate such a small portion of their budgets to evaluation (even broadly conceived) that little by way of findings is produced.

The Consortium Project not only accepted these challenges, it introduced some of its own. Its linking agencies, in addition to being geographically dispersed, were also diverse in their structures, missions, staffing, and orientation to schools. Secondly, there was a deliberate attempt to select schools in each state that reflected a demographic mix, so that we could experiment with linking agent strategies in urban, suburban, and rural settings. Furthermore, schools were selected for participation in the program based on the probability that solutions to their problems would impact on several aspects of school life. Quite obviously, both the project and the RDU program at large have been a rich source of experience for study and reflection.

It is appropriate, therefore, that at the end of such a program there be more than one publication to document the effects of its presence and to provide as many perspectives on the experience as possible. Before commenting on the volumes in the Series, however, I would like to acknowledge the work and the intense involvement of the project's linking agents and their supervisors.

Consortium linking agents were faced with the awesome tasks of not only helping schools introduce curricular improvements, but also of helping to define and implement a new role. In addition they were asked to document their activities to provide the research component of the project with baseline material for developing case studies. To Donna Bellorado, Nancy Dannenberg, Joseph DePaolo, Leslie Hergert, Carol Johnson, Linda McNeely, Lana Rahn, and Beverly Vifian goes a sincere thanks for your energy and your willingness to put yourselves under several

microscopes. Thanks also for representing the project in interviews, newsletters, and various professional meetings and forums.

In addition to working with these linking agents I have been fortunate to work with several experienced educators who acted as agency supervisors and subcontract managers for the project. They include James Connett, Diane Lassman, Max McConkey, Norman Oppenheim, Harry Osgood, Ralph Parish, Margaret Robinson, and Keith Wright. On several occasions they were called upon to rise above their individual and agency priorities to act in the best interest of the project, and each time they did.

The Consortium has been characterized as an anomalous collaboration among competing agencies. From my perspective, however, the collaboration was not an anomaly; it was the product of commitment, confrontation, openness, and hard work on the parts of these linking agents and supervisors.

Three of the five volumes in the Series were produced from the research component of the project. They evolved from the developmental work of Dennis Collins, acting in collaboration with the research directors of the other six RDU projects. It was this early developmental work that gave shape to the linker's documentation procedures and influenced the variables ultimately reported on in three of the publications.

Responsibility for the conceptualization of the school-level studies, Case Studies in Program Improvement, fell to Barry Gold who developed the framework for the studies with case writers Elliott Krause of Northeastern University; Ruth Anne Olson, a private consultant; and John Nickel, Wichita State University. Case research and preparation was also done by Alfred Wilson from Kansas State University and Mary Ladd Smith, another private consultant. The cases were designed to describe the project in its first two years at the site. At the end of the third year, epilogues of each case and a cross-case themes chapter were developed by Terrence E. Deal, Holly Gunner, and Martha Stone Wiske of the Harvard Graduate School of Education.

In editing the school-level studies, Christopher J. Drew coordinated the work of eight researchers in three states and regularly mediated conflicts between the researchers and the linkers under study. I am convinced that the cases are enlightening and the cross-case analysis compelling because of his active attention to argument and style from the early drafts to the final copy.

In preparing The "Inside" Outsiders: A Study of Three Consortium Linking Agents, Beverly Loy Taylor (Center for Policy Research, New York City) inherited a partially conceived conceptual framework, a great deal of already collected data, and an incredibly tight timeline. Rather than complain, she dug in: tightened the framework, found and filled gaps in the data through inter-

views, observation, and extensive document analysis, and stuck to her timeline. As project director, I was pleased with her thoroughness; as a professional, I am impressed with her monograph.

Chris Drew also conducted his own research within the project. His publication, The Consortium Project: A Study of Interagency Collaboration, is a description and analysis of the project itself and is based on his observations of the project in action. His interviews of me, conducted at intervals throughout the project, I found to be thought-provoking and professionally challenging. What he was able to use as data, I was able to take as feedback, and I believe that both of us benefited from the interactions. I certainly did.

Two project central staff took responsibility for providing several types of resources to linking agents. Peter Gardner and Susan Harris planned training events, conducted meetings, circulated information, and provided ongoing contact with the linkers. Their early work, providing resources related to specific aspects of the linker's role, created the prototype Linking Agent's Tool Kit, a collection of articles and resources. John J. Ford, III and Leslie Hergert accepted the responsibility to make the Tool Kit more generic. In the process, they have considerably upgraded the original set of resources and have added important substantive comments on the linker's role.

The Reflections book is our attempt to let project staff tell their own story. In addition to the story that unfolds, the articles also demonstrate that linking agents, like any group of practitioners, can play an important role in developing and sharing understandings about their experience. The writers represented in the book deserve credit for their willingness to think about their experiences and put forth their own analyses for public consideration and scrutiny. In editing the book I was fortunate to have the benefit of the editorial skill of Joan Wilson who worked directly with the paper writers on matters of clarity and style.

The Consortium has relied on the administrative support of a number of people over its three-year history, including Claire Durocher, Nina Demeritt, Nancy Lund, and Zeina Azzam, who had the massive task of coordinating production of this Series. In addition, we have had extensive technical support from Paula McCarron and David Pelletier of The NETWORK's Product Development Division, and from Richard Emery, a free-lance graphic artist.

I would also like to thank Thomas S. Israel of the National Institute of Education for his support throughout the life of the program and for his responsiveness and flexibility at times when our problems had no apparent solution.

One final note on the subject of contributors to the welfare of the project: in addition to the counsel and commentary of the aforementioned people, I have also had ongoing access to David P. Crandall, Executive Director of The NETWORK, who from the start of the project has made available his professional knowledge of research utilization and his experience in project management. His support has been invaluable and his influence on me over the years has been profound. I can only hope that the reports in this Series will reflect his high standards and his tireless quest to make NETWORK publications a contribution to the future, not a rationalization of the past.

For those of us who have lived with The Consortium since 1976, the Consortium Report Series will be, no doubt, the tip of the iceberg. We just couldn't get it all into print, and in truth, we didn't try. However, I believe that we've been honest with ourselves -- that we've not invented a tip of a make-believe iceberg -- and hope that there will be a great deal in these publications that others will find of use.

Richard C. Harris, Ph.D.
Project Director

AUTHOR'S ACKNOWLEDGEMENTS

Saying thank you is sometimes difficult. The words never quite express the real feeling, their arrangement is often awkward. They stand on the page like little fortresses, ready to hold the reader at bay until boredom or sleep mercifully intervenes. Here I'd like to say as simply as possible what is on my mind.

One linker, describing differences in linking styles, said: "It's where you put your energy." To paraphrase, saying thank you is acknowledging "where I got my energy." So:

Thank you, Rick Harris, for the long thoughtful pauses before you answer questions, for spending an hour and a half on the phone talking with me about linker observations, for sharing your many good ideas, for solving paper problems, knowing about Markles Flats, and taking risks.

Thank you, Chris Drew, for your gentle, friendly nature, the name of your New York tailor, your good habit of summing up meetings and listing next steps, your clear thinking, and your honesty.

Thank you, Zeina Azzam, for sending me everything I've asked you for copies of and never complaining, for that healthy streak of ambition in you, for giving me sustenance of all sorts (including lunches), and for having all those wonderful Z's in your name.

Thank you, anonymous (?) linkers and supervisors for putting up with hours of questioning, for taking time to give thoughtful feedback to study drafts, and for not initiating any lawsuits against me.

Thank you, Matt Miles, for sharing your ideas and library, for not evicting me from what is now your office, for new-project patience, and for gentle care of noble Big Blue.

Thank you, Zoe Harrison, for tolerating my obsessions with perfectly functioning typewriters, no interruptions, hippos, and things that had to be done yesterday.

Thank you, Sophie Sa, for your graciousness and flexible problem solving in matters of space, telephones, bills, and creating thousand-year-old eggs in 90 days.

Thank you, Carol Pedersen and Bess Shenton, for shielding me and providing pats on the back when needed.

And thank you, Maggie, for tolerating my long absences without so much as a reproach, for hanging in there, and for holding down the fort while I take a vacation.

PART I: ABOUT THIS STUDY

While the term "inside" outsiders may conjure a variety of far-removed images, ranging from that of a departing guest who takes forever to get both feet across the threshold, to sweatshirts intended to be worn fuzzy side out, it in fact refers to an emerging educational role: the external linking agent, whose function is to span the boundaries between research and development, technical assistance, and school districts. This "inside" outsider is a third-party consultant, equipped with enough "inside" knowledge of the district and its workings to be effective, yet remaining outside of it, objective and unbiased.

The Consortium Project, funded by the National Institute of Education from 1976-1979, was designed as a collaborative effort among six intermediate education agencies to explore the external linking agent role and to experiment, most ambitiously, with the creation of a prototype linkage support system. Operating in six states spread across the United States, one external linking agent per agency was identified to work with four school sites in his/her state in a fairly intensive way to help school people to identify a reading problem; examine research-based and/or validated reading programs developed with federal funds; select a program; and train for, implement, and evaluate it.

In addition to its research utilization and technical assistance aspects, a research component was outlined for the Consortium Project, the final products of which are included in the Consortium Report Series. This study is part of that Series, which also consists of six case studies and epilogues, the Consortium Project study, a cross-site analysis, and a collection of reflections by various participants in the Consortium.

The aim of this study of "inside" outsiders is to create a picture of what the Consortium linking agents did in carrying out their linkage work, what kinds of background experiences they brought to the effort, and what supports were available to them from the linkage system.

SELECTION OF SITES AND LINKERS*

The original agreement with the National Institute of Education was to carry out six case studies of school sites, presumably one per state, and two linkage studies. Through discussions with

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* The term "linker" is used interchangeably throughout this paper with "linking agent."

other researchers, the Project Director came to the conclusion that selecting two sites per state (in three states) might yield valuable comparative data, and studying those three states' linkers would not only provide an additional linkage study but also offer an opportunity for getting richer linking activity data, since each would be involved in two case study sites.

During the first year of the Consortium, all six linkers were asked to nominate sites for possible case studies on the basis of their potential for providing good data on what was happening at the sites vis-a-vis the linking agents. In addition, the Project Director visited all of the sites in the fall of 1976, which, combined with his reading of linkers' contact reports, gave him a clear sense of each site and its potential for study. A geographic and demographic spread was desired, and a programmatic element was added when it turned out that three diverse sites selected the same program for implementation, thus offering the potential for cross-site analyses of implementation in different settings.

Using these criteria of (1) potential for supplying rich data, (2) geographic representation, (3) demographic spread, and (4) cross-site program implementation study, six sites in three states were selected. The linkers responsible for those sites thus became the subjects for this study. The results were: an urban and a suburban site in the north central part of the country, a rural and a small town site in the midwest, and a small city and a suburban site in the northeast.

STUDY METHODS

Preliminary work on the linkage study was begun in the fall of 1977 when a researcher was hired to develop a work plan and to begin the study. That researcher conducted a personal interview with each of the three linkers in the spring of 1978, and had each tape transcribed. The study was resumed in May 1979 by this researcher and concluded at the end of August. Data collection was primarily a task of reviewing existing documentation and interviewing linkers and their supervisors at their agencies.

The following documentation materials were reviewed:

- Linkers' contact reports for the six sites from the beginnings of the Consortium Project in the summer of 1976 until the spring of 1979. These reports were completed for each contact the linker made with school or district personnel, whether in person or by telephone. During the final year of the project, these reports were prepared as monthly contact summaries.

- Six case studies of the sites, completed in June 1978 by independent researchers.
- Six epilogues to the site case studies, completed in July 1979 by independent researchers.
- Three interim reports written by linkers for the six sites upon completion of an activity phase:
  - Problem identification
  - Implementation plan
  - Report on implementation
- Transcripts of linker interviews conducted by previous researcher in spring 1978.
- Management Reporting Process documentation from January through December 1978.
- Consortium proposal to National Institute of Education, dated February 1976.
- Responses to questions regarding proposal, dated April 1976.
- Descriptive information regarding three intermediate education agencies.
- Evaluator's study and survey materials.
- Assorted papers and reports on linking agent roles and activities.

This researcher had the opportunity to meet and observe the Consortium linkers and their supervisors at a two-day Consortium meeting held in May 1979. Brief interviews, conducted at that time, were followed by more formal interviews at each agency. (Protocols for the formal interviews are included in the Appendix.) Additional informal discussions and observation of a staff meeting provided more background information. In early June 1979 two days were spent at the northeast agency, interviewing the linker and the supervisor; two days in mid-June were used for interviewing the linker and linker-turned-supervisor at the midwest agency; and one day in mid-June was spent in interviewing the north central linking agent, whose supervisor was not in the city at that time.

In addition, the Project Director at Consortium Central was interviewed, as were other project personnel, during the period from May to August. All formal interviews were taped and later transcribed.

Case studies of the linkers (Part III of this report) were developed from file cards of pertinent information the researcher

copied from contact reports and from margin-coded documents and interview transcripts, all keyed to a working outline produced early in April. Drafts of the studies were sent to linkers in late July and early August, requesting that they correct errors of fact and offering them "equal time" for presenting their own versions of interpretations made by the researcher.

Linker responses were collected, page by page, over the telephone, and were incorporated into the resulting final report in one of two ways: (1) in cases of factual error or lack of clarity, draft copy was altered; and (2) for alternative interpretations, a footnote was added. This feedback process was valuable, not only from the perspective of adding to the accuracy of the studies, but also because it underscored the importance of treading carefully when depicting people in studies such as these. For example:

- Even though the names of people, agencies, and school sites have been omitted (by using role names or geographic designations) or changed (school pseudonyms), everyone in the Consortium Project, or for that matter, in the larger group of projects funded to encourage resource utilization, knows who's who. In fact, there is no anonymity, according to Consortium participants.

- Many people are naturally sensitive to seeing themselves in print, exposed, so to speak, to the world. The general response was self-protective, though in one case, the respondent issued a veiled threat to the researcher. And not surprisingly, perhaps, most feedback focused on the more interpretative sections, e.g., the linker characterizations, role interpretations, and observations of the roles.

- While most attention focused on attempts to present themselves more favorably, there was honesty too. For instance, one linker said, "I really didn't hold those meetings on _____, and while it makes me look good, I can't take credit for doing it."

- If careers aren't at stake, at least reputations might be enhanced, or worse, damaged somewhat by a report such as this one. One linker asked that the site identification be omitted from a comment she had made about a group member, who, it was feared, would recognize herself and be angry with the linker for having said such a thing.

It should be noted that the linkers only had the opportunity to review drafts of their own studies, and not any other parts of this report. Their willingness to take the time to read and respond thoughtfully to the studies is greatly appreciated, as is their hospitality in receiving the researcher at their agencies and protecting time for interviews and discussions. The resulting

report is stronger for having the benefit of their efforts, and the researcher hopes that no disservice has been done to them or their agencies.

STUDY OVERVIEW

The rest of this report is divided into four parts, each of which is described briefly:

- Part II: The Linking Agent Role -- This section presents a general discussion of the role of the linking agent, as well as a more specific description of the Consortium linking agent role and linkage system.

- Part III: Three Consortium Linking Agents -- This part consists of the three studies of the Consortium linkers, and it represents the bulk of the total report. Each study is organized according to a common format: (1) a characterization of the linker as a person, (2) a description of the linker's agency, (3) the linker's own perception of his/her role as a linking agent, (4) a description of the resources most utilized by the linker, (5) an account of linker activities at two of their four sites over the three-year period, and finally, (6) a linker report of likely effects of linkage work upon the sites, the agencies, and themselves.

  Furthermore, section (5) on linker activities at the sites divides the linkage work into five major phases, drawn from the milestones which guided Consortium work (see Appendix for a list of these milestones). These five phases include entry into school sites, problem identification, program selection, training and implementation, and disengagement from the sites. Each phase within each study is followed by an observations section on the roles played by the linkers during the given time period.

  At the end of Part III, there is a set of general observations.

- Part IV: Reflections on the Consortium Linking Agent Role -- This section describes the Consortium role in terms of its "inside" outsiderness, its designability, and its inherent stress domains of marginality, novelty, and complexity. The afterimages of the role conclude the section and the study.

- Appendices -- Included are two interview protocols for the linker study (one for linkers, one for supervisors), a list of Consortium milestones that guided linkers' work, and a bibliography.

PART II: THE LINKING AGENT ROLE

The role of the linking agent has been emerging for several years, and during this "coming out" period has undergone considerable metamorphosis according to the various interpretations given it by those having some connection with its functions. While the definitions vary somewhat in complexity, they all place the linking agent at the interface between two systems, usually research and user systems, and identify the linker function as that of connecting the two. Thus, the linker is expected to put practitioners in touch with appropriate resources, both human and material.

The term "linking agent" is a generic umbrella for a variety of job titles, which could include Havelock's change agent (1973), Heathers' local change specialist (1972), the educational improvement specialist, educational extension agent, facilitator, and, of course, linker. The first three imply functions beyond simple connection between resources and users; one can visualize specialists working with school building or district personnel in some ongoing problem-solving capacity. The others could or could not be regarded as equally ambitious, depending upon what factors make up the determination of the role.

At its least complex, a linking agent role might be filled by a book salesperson, serving what Crandall (1977) refers to as a "product peddler" function, in which the linker simply puts materials into users' hands. Butler and Paisley (1978) speak of linking agents as resource linkers, process helpers, and solution givers -- three major functions combined into one role. Added to this tripartite role, Havelock's change agent would be expected to serve also as a catalyst for change. Piele (1975) suggests a collaboration function as well, while others would add those of coordinator, energizer, and counselor.

Standing under the linking agent umbrella, then, are persons functioning in a variety of ways and levels of intensity, from short-term product peddlers and awareness workshop conductors to longer-term resource arrangers, process enablers, program facilitators, technical assisters, and capacity builders (some of these role names from Crandall, 1977). Their frequency and length of involvement with sites range from one-shot meetings or conferences all the way to regular contacts over a period of time, sometimes one or more years. Linkers may work with individuals or with groups, at the school building or the school district level, and in areas including curriculum, process, and organizational issues.

Linking agents, as connectors between two systems, are outsiders to both; they are, in fact, "boundary spanners," having one foot in each camp, so to speak. (There are also internal linkers,

change agents, etc., whose roles will not be discussed here.) But even the "fact" of being outsiders varies, depending in part on the length of time and depth of involvement at sites, and the level of "insideness" achieved by the linking agent through trust, ownership, familiarity, and expertise. In speaking of the linking agent role, then, as with anything else, one must define one's terms.

THE CONSORTIUM LINKING AGENT ROLE

The Consortium was designed to: (1) increase school people's awareness of the existence of R&D products, (2) increase the probability that they would look to these products as a source of help for future problems, and (3) significantly improve students' achievement in reading. Thus, the Consortium sought to bring proven R&D programs to schools with identified needs in reading via the face-to-face intervention of linking agents, who would work with school people on a long-term basis (originally two and a half years, which was lengthened to three in order to finish out the 1978-79 school year).

The general strategy with which the Consortium linking agent role might be identified is the linkage process model (Havelock and Lingwood, 1973), calling for long-term, intensive interaction with a small number of clients in a group. The linker is responsible for using a problem-solving process with clients, who presumably learn the process by virtue of having gone through it: identifying needs, diagnosing problems, developing a problem statement, searching for solutions, retrieving/fabricating a solution, and applying the solution. The Consortium model, however, lacks the macro-system linkages of the Havelock-Lingwood model, specifically, the notion of connecting R&D centers, universities, school districts, state education agencies, and so on, although it does create a fairly extensive one of its own (see following section on linkage system) in which <u>individuals</u> from a number of organizations are connected. Both models call for significant amounts of time investment and internal knowledge sources.

The task of the Consortium linking agent was to participate in the creation at each of four sites of a multi-constituent group (teachers, building administrators, parents, board of education members, central office representatives) and to work regularly in a single area (reading instruction) by aiding the group in:

- Identifying problem areas
- Resolving conflicts
- Generating alternative solutions

- Accessing available programs (from a pool of 40 proven R&D programs)
- Training for, implementing, installing, and adjusting the program
- Developing an ongoing problem-solving capacity*

This list underwent a series of iterations by Consortium Central staff and the network of Consortium linkers and their supervisors at the six participating intermediate educational agencies. By about December 1976 the list had been developed and refined into a set of 16 milestones which guided linkers' work (see Appendix for milestones).

The Consortium linker function, then, called for fairly intensive intervention over a period of several years with a group of school personnel in a process that began with problem identification and went through development of criteria, program examination and selection, training, implementation, and troubleshooting. At the front end were such additional functions as (sometimes) site selection, and entry and trust building. At the back end were others, such as evaluation, diffusion and dissemination, plus disengagement from the site at the end of the project. The Consortium linker was also expected to plan and conduct two statewide conferences for participants at the four school sites involved in the project.

The roles most utilized by Consortium linkers were those of process enabler, requiring the use of skills in such areas as decision making, problem solving, communication, leadership, collaboration, and conflict management; resource linker, calling for the ability to anticipate and diagnose problems or needs, and identify, locate, and acquire resources; resource arranger, entailing the planning and carrying out of logistical arrangements for training, implementation, site visits, follow-up training, and so forth, all requiring the tracking of school participants, consultants, and materials, and good skills in resource utilization; and coordinator, necessitating the use of skills in organization (of self and others), facilitating planning and implementation activities, opening communication between the central administration and the school, and timing events to fit with school and district schedules. A fifth role, that of documenter, or observer/recorder, was also important for the Consortium linker, who was required to do a fairly heavy amount of documentation of contacts with sites, as well as notation of

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* This list is derived from the April 1976 responses to questions regarding the proposal, page 23. The last task on the list was sometimes considered legitimate, and sometimes not. See discussion in the general observations section of Part III of this report.

contact objectives, background information, analyses of events, and next-steps planning. In addition, there were interim reports and management reporting forms to be completed. This documentation was designed to fit with the needs of the research component of the Consortium as much as to aid linking agents in thinking about their work with school sites and to provide an ongoing record by which they could refresh themselves on site events.

From this array of roles, activities, and skills, the main function of the Consortium linking agent emerges: Consortium linkers build temporary inside groups to utilize outside resources. (One also could accurately point to many instances in which linkers help groups to use resources originating inside their own systems as well, e.g., utilizing materials or services within the district, or organizing parents in some different way to work with the school.) For the most part, these outside resources were limited; that is, program selection, for example, was expected to be made from among the 40 or so R&D proven reading programs. In this vein, it could be said that Consortium linking agents used a mix of product-centered and consumer-centered approaches: they promoted the adoption of educational products from a particular pool of programs; and they responded to the expressed needs of the client system by providing access to those programs, though Consortium linkers started a step earlier by helping clients define their needs.

The intent is clear. Not only do Consortium linking agents introduce school people to the R&D "market" and encourage them to "buy" one of the programs, but they also build in the notion of "repeat business" by having made the experience a valuable one for school people because of the linker time and energy invested in the site (good service) and, not least of all, the "bonus" left behind -- capability in using a simple, effective, rational problem-solving process, which can be used again and again. The hoped-for outcome is fair and straightforward: in the future when school people identify needs in curriculum, management, or organization building, it is hoped that they'll think of examining (and selecting) the R&D programs that were developed with federal funds to help bring about school improvement.

Does this make the Consortium linker a salesperson? No. Perhaps to the extent that school people view the linker as "pushing" products from the R&D pool, a qualified yes would be accurate; but school sites could opt for no program and say goodbye to the linker, who could leave without fearing loss of salary or commission. It is true, though, that linking agents aren't really neutral either: they are "selling" R&D utilization and to some extent, a problem-solving process, and they bring with them their own personal and agency agendas (self-image enhancement, ideologies about school change, agency missions, etc.). In this sense, the Consortium linker may be more of a trade negotiator bartering

with resource programs, process help, time and energy, users, consultants, dollars, reputations, settings, ego needs, future "business," career advancements, and so on.

THE CONSORTIUM LINKAGE SYSTEM

The Consortium linker did not operate completely "out in the cold"; there were several components that went into the making of a pretty substantial linkage system. The Consortium functioned as a linkage system of people occupying specialized roles, having access to a variety of products and materials, and using a number of mechanisms to get feedback and assistance in planning and implementation. These are described briefly, in turn, and are detailed in the use of resources sections in Part III.

ROLES. At Consortium Central, three roles were of most importance. The Resource/Data Management Coordinator provided fast, detailed, and thoughtfully gathered information on the programs in the R&D pool, actual program materials for sampling, names of trainers and consultants, as well as other users. She also put together the Tool Kit, which is discussed later. The Linker Support Specialist, in a role created in late 1976, offered assistance to linkers by providing psychological support, a "knowledgeable ear" for talking through issues, interpersonal intervention help, and a means of tightening the network of linkers in the Consortium. He also put out the two in-house newsletters, one for linkers and one for school personnel, which are described later. The Project Director provided strong consultation help to linkers in addition to the management, guidance and budget assistance usually associated with this role.

At the agencies were the linking agent, of course, working (usually) 80 percent time on the project; the agency supervisor, about 20 percent time on the Consortium, and serving as a "partner" to the linking agent, that is, a person on-site who knew and understood the project and the linking functions and who could provide immediate support and assistance, in addition to the usual monitoring of a supervisory position. Other agency personnel were available to offer resources and nurturance, ideas and help. Agencies usually operate a staff matrixing plan in which personnel may give a certain percentage of their time to other agency projects, thereby encouraging cross-project idea germination.

At the school sites were central office personnel, the principal, members of the multi-constituent group, and other school staff, all of whom provided input, feedback and assistance in many ways to the linkage system. For example, some linkers developed certain site people as key contacts. Others gave joint presentations with site personnel at educational conferences.

The network of linkers created by the Consortium and strengthened by the regular Consortium meetings constituted a potent new support group for individual linking agents. This network was enhanced by meetings with other R&D utilization linkers at educational conferences such as the Dissemination Forum and the American Educational Research Association (AERA).

Finally, there were program developers, trainers, and consultants, who got hooked into the linkage system when their programs were selected for implementation or their particular expertise was required for linkers or for site personnel.

MATERIALS. The pool of 40 R&D reading programs, approved by the Joint Dissemination Review Panel (JDRP) of the Office of Education and the National Institute of Education, were the outcomes from which school site personnel would select a program for implementation. They were supported by a host of descriptive materials -- catalogues, brochures, abstracts, and sample materials -- gathered and distributed to linkers and school personnel by the Resource/Data Management Coordinator at Consortium Central. In addition, there were a number of R&D tools for identifying problems, developing selection criteria, analyzing curriculum, matching needs and curriculum, and so on -- for example, Far West Lab's paper on "Defining Curricular Problems," their Curriculum Analyzer, the Chalk Talk simulation game, and Research for Better Schools' RBS Inventory -- used by linking agents in working with school personnel. Many of these tools were placed in the Tool Kit, a collection of articles and excerpts that was distributed to linking agents in October 1977. The Tool Kit was developed by the Resource/Data Management Coordinator and the Linker Support Specialist and included: (1) an annotated list of the articles, (2) local site objective lists -- milestones and relevant readings, (3) a subject index, and (4) an alphabetical list of the contents, in addition to the 85 or so articles which were keyed to the 16 milestones. Finally, there were a number of materials on reading theory and instruction, which were distributed to linkers by mail or at Consortium meetings.

MECHANISMS. First and foremost among the Consortium linkage mechanisms are the regular Consortium meetings, kicked off by a joining-up conference at the outset of the project and followed up every six months (sometimes more frequently) by a meeting often held at one of the participating agencies. There were nine meetings in all:

- June 1976: joining-up conference -- project overview, team building, diagnosis of skill needs, planning, documentation
- August 1976: linking agent training -- consulting relationships, introduction to the field of reading,

orientation to some R&D products, linker role, process skills, selection criteria, curriculum development

- December 1976: linking agent training -- review of R&D products, consulting skills, running meetings, Consortium milestones and long-range planning, role plays
- June 1977: linking agent workshop -- linking agent roles and functions, self-assessment, strategy development, case presentations, feedback, implementation planning
- October 1977: project meeting -- problem solving, strategy development, year three planning, evaluation, state-wide conference planning, R&D products
- April 1978: project workshop -- stages of concern and levels of use of a program, year three planning, information sharing, special interest sessions
- October 1978: project workshop -- plans for learning consolidation, institutionalization, problem solving on selected issues
- March 1979: project workshop -- work sessions on learnings monograph, linker sharing and planning
- May 1979: project workshop -- extension of Consortium work, future linkages, contingency planning

While the original purpose of these meetings was to provide training in diagnosing organizational problems, general consultation, intervention strategies, group problem solving, inservice training, and process versus content assistance (proposal, page 24), this plan was short-circuited. Tension existed between generic skills training interests of Consortium Central and the specific problem sharing and troubleshooting needs of the linkers themselves. In addition, many of the linkers (and their supervisors) resented the notion of being trained by personnel from an agency that they considered to be on a par with their own. The result was circumvention of the plan to provide training in selected areas and a shift toward structured sharing sessions among linkers.

Other mechanisms in the linkage system included circuit rides, first by the Project Director and later by the Linker Support Specialist, to the agencies and school sites. These visits not only gave Consortium Central staff a firsthand look at sites, but more importantly, perhaps, they connected the linker, the sites, and the Consortium Central staff more tightly and provided the opportunity for linkers to get feedback and assistance on their site work. Circuit riders' presence at sites helped to ground school personnel in the whole project, to give them a view of the larger picture. The state-wide conferences served a similar purpose, not only linking school people to other participants in their state, but also to the national system since someone

from Consortium Central usually attended. The in-house site newsletter, In Process, was distributed to school personnel to heighten the sense of participating in a joint effort. The parallel Linkerland News, distributed to linking agents and supervisors, served a similar function by presenting events, updates, stories and photographs of participants. Both newsletters were written by the Linker Support Specialist from data in linkers' contact reports.

The 16 milestones served a linkage function by keeping linkers on the same path as they went about their activities. They all carried out roughly the same tasks, though often in a different order and in personalized ways and schedules. One supervisor, however, sensing an air of competition, dryly referred to the milestones as "the horse race." At the entry phase of the linkers' association with sites, the individual teacher interviews became a mechanism for hooking the linkers one-on-one with staff, for "breaking the ice and becoming known in the school." The documentation required of linking agents served to link them with Consortium Central personnel, indirectly with other linkers via the Linkerland News, and in some instances was said to have strengthened the connection between the linker and other agency personnel. Finally, frequent telephone communication provided an obvious means of linkage in the whole system that was facilitated by the toll-free "800" number of Consortium Central.

In this picture of the Consortium linkage system, one can visualize the linking agent at the center of it all, the "inside" outsider spanning the boundaries of the three entities of Consortium Central, the agency, and the school site. With the linking agent in the middle, these three systems are linked to one another. The linker, in some ways, orchestrates the various parts of the three systems to match needs with resources, advice, assistance, materials. This interaction occurs only through the efforts of the linking agent.

In the next section of this report, Part III, the orchestrations of three different linking agents are described in order to shed some light on linker activities.

PART III: THREE CONSORTIUM LINKING AGENTS

In this section the reader will find the stories of three linking agents, stories that trace their activities at school sites, describe them and their agencies, discuss their perceptions of the linker role -- in short, stories that present a picture, if you will, of these linking agents.

Included in each study are: (1) a characterization of the linker as a person; (2) a description of the linker's agency, which provides the background for the linkage work; (3) the linker's own perception of his/her role as a linking agent; (4) a description of the resources most utilized by the linker; (5) an account of linker activities at two of their four sites; and finally, (6) a linker report of likely effects of linkage work upon the sites, the agencies, and the linking agents themselves.

A general observations section, drawing upon all three of the case studies, concludes Part III.

Any case study writer will attest to the fineness of line between an objective and subjective stance in relation to the subject (or object) being observed. Naturally, information is funneled through the perceptions and viewpoints of the observer/writer, no matter how carefully he or she toes the line of objectivity. The mechanism used in this report to inhibit the tendency of the objective and subjective realms to dissolve into one another is the use of a narrative and an observations section. Thus, the narrative sections describe (objectively) linking agent activities in the context of two school sites according to the major phases of the linkage work. Each of these phases is followed by an observations section which comments on the roles that linkers played. The observations section is marked by a bullet and a slight indentation from the margin.

Other sections that fall within the observations rubric are those dealing with characterizations of linkers, since they are based on the writer's "reading" of them from personal interviews, observations at meetings, informal conversations, their contact reports, and to a limited extent, others' perceptions of them.

Beyond the objective-subjective view of that which is being observed, there is, too, the notion of pictures that change over time, because of variations in observers, interpretations, conditions, attitudes, and so forth. Monet understood this quite well when he set out to paint his series of the Chartres Cathedral, when he varied only the time of day, and hence, lighting and weather conditions. (Presumably, his attitudes varied as well, particularly from his 6 a.m. to his 4 p.m. renderings.) Needless

to say, the results of the various pictures of reality presented in his series varied enormously. While the writer of these studies does not suffer from any delusions of creating artistic reality on the level of a Monet painting, it is clear that the problems of representing reality are similar, whether one is painting a cathedral or depicting a linker in action. And, indeed, representing a stationary object, such as a cathedral, under differing light and weather conditions is one thing; attempting to achieve an accurate picture of people in action during a time period since passed is quite another.

Let this introduction serve, then, not as an apology, but as an explanation for any fuzzy or distorted impressions that may follow.

THE NORTH CENTRAL LINKING AGENT

CHARACTERIZATION OF THE LINKER

The soft voice and gentle manner of the North Central linking agent belie her determinedness and clarity of purpose. Of her, an observer has noted:

> Balanced is the word for her attitude. She's clear on her goals and able to handle the crud that flies her way. She works very hard to deliver on promises and expectations.

One gets the sense that she has grown into the linking agent role, explored it, watched and listened carefully, and in the course of three years, achieved a happy balance between her own working style and the demands of the job.

She brought a strong education background to this position. Currently at work on a master's degree in curriculum and instruction, the North Central linking agent taught for five years in elementary schools, mostly in urban school districts, and during the summers teaches reading in the Title I program. She coordinated a paraprofessional training program for the city public school district, which has resulted in a number of community people getting started as paraprofessionals and, in some cases, subsequently going on to become teachers themselves. She also trained teachers in ways to use paraprofessionals in their classrooms.

Still an employee of the city public schools and a certified elementary school teacher, she is the only one of the three linking agents involved in the case studies who can lay claim to knowledge and experience in reading instruction. She has taught reading, completed coursework in it, and selected it as a related field in fulfilling requirements for her master's program. Her reading background stood her in good stead as she worked with school site people in the Consortium Project. She reports:

> I found it helpful during the selection phase for evaluating the appropriateness of a program for a site and during implementation for understanding teachers' problems. But having a reading background alone would not be sufficient for being a good linking agent.

What <u>is</u> needed, then, for carrying out linking activities? The linking agent cites as among her strengths the fact that she knows a lot about the world of schools and has experienced much of what the teachers are doing, which has had the effect of building her credibility with them. Knowing schools well has caused a sharpening of what she refers to as "compromise skills." She says:

> When I go into a school, I understand that my agenda is only part of what's important there. Sometimes my work must be delayed in favor of something much more pressing to the staff.

Looking at this ability from a different perspective, though, she continues:

> Maybe I was much more tolerant of their schedules than I should have been. It helps people if you tell them you feel strongly about something and want their help in doing it. That puts the responsibility back on them. If I had been more forceful in pushing my agenda, we might have moved faster.

But then, perhaps the bottom line for her was a teacher's comment to her at a state-wide conference last June: "It was nice working with you. You always knew when to schedule meetings."

The above discussion is a good illustration of the linking agent's tendency to look at an issue from more than one perspective, as though she were turning it around in her hand to get a complete sense of it. On some points, she is very definitive:

> The linkage role requires the ability to team with other people easily, both at the sites and at the agency. I can do that well.

And:

> It's essential for teachers to be involved in decision making, to have ownership of the program they'll be using, but without the visible backing of the principal, the whole project becomes questionable. That's where I worked hardest: keeping the principal aware, involved and supportive of the whole effort.

Among the group process skills that the linking agent uses well is her ability to create the kind of climate that encourages people to express themselves freely. She honors varied perspectives and permits participants to vent their feelings, thus using an effective device for defusing animosity and gaining cooperation. Writing in the first month or two of the project, the linking agent stated:

> One of the goals of this work is to develop an atmosphere where educators identify the linking agent as a helper, a person they can trust and look to for assistance and support in carrying out their teaching responsibilities.

It appears that she was able to achieve that goal. Said one observer after a meeting in which the linking agent was conducting a simulation exercise to which the school principal objected:

> She gave the principal the space to ventilate and supported his challenge that the game orientation was not directly related to his perceptions of the task at hand. She was hearing him clearly and

> acknowledging his point of view; that seemed to help his increasing cooperativeness. She then was able to specify those lessons that participants had learned from playing the game. The principal turned around on it, and the outcome was useful.

Asked to characterize her style of operating with her sites by placing herself on a continuum with proactive/directive (10) on one side and reactive/nondirective (1) on the other, the linking agent responded that she was probably between 6 and 7, and had perhaps moved there from a more reactive point. Early in the project, a site visitor from Consortium Central noted:

> She's not comfortable with taking control of the intervention; she seems more comfortable being responsive. I told her that I thought she needed to be aggressive in stating what role she wanted to play with respect to the group, that she needed to be more than a switching station so she could help with problems further down the road.

Her predilection for giving people space and the opportunity to express their ideas may suggest a more responsive approach in small group work, but the linking agent feels that when a directive stance is called for, she is quite capable of taking it. She reports an incident:

> At one site the group had selected a reading program, but one teacher decided not to participate in implementation because it required too much time for training and preparation. In a meeting with the principal and another teacher to discuss the implications of this teacher's lack of participation, I was upset to hear the principal agreeing with the teacher on every single point, so I told the principal: "I'm very concerned about what I hear you saying, because it sounds as though you don't support the teachers' decision to implement this program. I think we should clarify that before we go any further in discussing with George what he wants to do about participating." We hammered it all out, and I found that my behavior in this instance had been effective. The principal explained her reservations and stated also that she could support the decision the teachers had made. After that she was very supportive of our work, very supportive.

A day spent with the North Central linking agent at her agency proved her to be an extremely well organized, conscientious, and reliable young professional. In her contacts with others she was articulate, assertive, and quite gracious, revealing a good memory for details and extraordinary patience (maybe too much, according to her). Not one to "toot her own horn," she in fact is hesitant to take credit for her work, tending to focus more on the accomplishments of site people. She has been described as bright, creative, and extremely personable, and it is these qualities, as much as her professional skills, which no doubt have facilitated her entry into the school sites, aided in the development of good working relationships, and led to the positive outcomes of her efforts.

THE LINKER'S AGENCY

The agency in which the North Central linking agent works is the dissemination unit of a city school district/university teacher center, supported cooperatively by those two organizations. The school district contributes by assigning some of its personnel to the center. The university provides space, funds and personnel supports. Serving public and non-public schools in 18 southeastern counties of the state, the agency cites as its major purposes:

- To link educators to high-quality educational resources, including materials, methodologies, and technical services
- To aid educators in acquiring the skills and information needed to select and utilize appropriate resources effectively
- To carry out dissemination-related research and evaluation
- To provide training and technical assistance to disseminators working in school improvement
- To develop dissemination products and maintain a curriculum resource bank

Utilizing Title IV-C, USOE, and NIE funds, the agency works through such projects as the Consortium, by aiding schools in selecting and implementing reading programs. Other projects used to work with schools include the State Facilitator Project, Urban Arts, and Project Information Packages, where such activities as providing awareness and training workshops on federally approved programs and informing educators of successful locally developed programs for underachieving students in math and reading are conducted.

Each fall the agency sends out an Interest Update Survey for determining schools' priorities, interests, and needs for more information. These survey returns, plus contacts with curriculum generalists, principals, and others making inquiries at the agency, provide the content basis for establishing the schedule of workshops planned and conducted throughout the year.

The agency disseminates information regularly through its newsletter, sent to educators in over 500 public and private school districts as well as to state and federal agencies and interested individuals. The Consortium, as one of its projects, is described in detail in the newsletter, which has led to substantial interest in it (and the agency).

Barely five years old, the agency is located in a comfortable set of offices on the university campus. There's a pleasant bustle of activity and a frequent, friendly bobbing in and out of each other's offices to check a detail or to say thanks for the coffee-

cake brought that morning. Offices are bright and tiny, cluttered with current project and personal paraphernalia. The outer area is piled with boxes of materials for the workshop next week and files from (probably) a couple of years ago. A bulletin board is littered with snippets and cartoons about the Chicago snow dump this past winter. While the agency appears to have outgrown its quarters, much as a child does its clothes, there don't seem to be signs of strain or tension among its occupants. The atmosphere is bright and cheerful, industrious and energetic.

THE LINKER'S PERCEPTION OF HER ROLE

The North Central linking agent viewed as the overriding goals of her work that she: (1) assist schools in using R&D outcomes that match their needs, (2) help change to take place, and (3) increase schools' capacity to solve problems by helping them learn to select curriculum based on their needs.

The linking agent outlined the means by which she would accomplish these goals, which the researcher then divided into four major role categories (taken from Crandall, 1977, 222-228) as follows:

> Process enabler -- organize a group of teachers, a multi-constituent group, to make decisions; help teachers to communicate individually as well as with the whole group; help the group to articulate what the problems were and to seek and examine supporting data
>
> Information linker -- provide the group with information about resources; put the group in touch with program developers and with users of programs it was interested in exploring
>
> Resource arranger -- help the group set up training events; order materials; help the group with budget concerns
>
> Technical assister -- learn about the group and its situation so as to judge the fit of various programs being considered; aid with implementation problems; help teachers to evaluate their implementation progress

In spite of this list of activities which she generated, the North Central linking agent tends to describe her role simply as that of a connector, an information provider, and to some extent, particularly during implementation, as a supporter, or as she put it, a "handholder." She "put people in touch with what they needed." She provided basic information services, "but I don't think I ever acted like a content expert, except that occasionally I used information I had about reading to help me help them with implementation problems." While she readily admits to being an initiator

("I scheduled meetings, and I set agendas"), she generally cushions the statement ("but agendas could be altered by the group").

The word that emerges most frequently in her role description is "help," about which she says:

> It was very clear to me from the beginning that they would be making their own decisions. I was there only to help. Teachers were ready to do something, and I was helping that process. I don't think it would have happened without my being there, but they were ready for change and my job was to help them to stretch themselves to a point where they could operate more effectively.

She continues:

> The role of a linking agent is not an especially powerful one. You don't go into the school with a right to change anything or the power to tell anybody what to do. You have to see it as a helping role. And you have to think about alternative strategies for getting the group to do what you want, what you think is important for them.

For example, when teachers would say they didn't have time to meet with her, the linking agent would consider what incentives might cause them to alter their thinking. She might pay substitute teachers so that regulars could be released from classes. Sometimes she had a dinner or a wine and cheese meeting at someone's house so people could relax together. Or, she might settle for the half hour they said they could manage for a work session. She knows their concerns:

> They teach all day everyday. It's important not to be inconsiderate of their time demands. They have heavy schedules.

Describing her role in the group's decision making, the linking agent stated that she only shared information. She didn't "vote" in the group, and she didn't give opinions. She added, somewhat wryly, that nobody ever asked her opinion either. She notes:

> The most I ever did was to push them to look at the characteristics of different programs by listing their pros and cons, so they'd make decisions based on real differences between programs. I tried to be neutral when presenting information about one program or another because I realized that I could influence their decision by the way in which I gave them information.

Another part of her role is what might be called "buffering," or easing the passage of the new program and the process required to put it in place. The North Central linking agent spent a good deal of time working with individuals to keep them abreast of developments within the group. For example, one principal only attended meetings intermittently, though he was an official member of the group. The linking agent speculated that his absences were an effort to give over some decision-making power to his

staff, since he always seemed to have time in his schedule for the meetings and was interested in their outcomes. Nonetheless, after each meeting, she would spend a half hour to an hour debriefing him and the district curriculum coordinator.

At another site the district curriculum coordinator was concerned that the linking agent might undo the district-wide reading program at the Consortium school. The linking agent felt that she had to spend time reassuring the curriculum coordinator:

> I made it clear to her that if the reading series was a "given," then our group would treat it as such. I wasn't trying to change her whole program. I made it a point to inform her of everything that the group was doing. She was in the group anyway, so I urged her to attend our meetings and participate. She did, and finally relaxed.

In summary, then, the linking agent viewed her work as helping others to help themselves, connecting them with needed resources, and keeping them on track as they explored options, made choices, and tested them out. This perception of the linker role evolved over time and out of her own experiences before and during her involvement with the Consortium Project, the linker training provided by Consortium Central, exchanges with other linking agents, literature on linkers (for example, Linking Processes in Educational Improvement, Havelock's work, and that of Butler and Paisley of the Far West Lab). In addition, her grounding in the ways of her agency -- expecting linkers to provide support to link schools to resources, to offer training for different levels within the school culture (principals as well as teachers), create multi-constituent groups for decision making, and address the need to build school capacity to solve problems -- all set the context for the way in which she interpreted her linking role.

THE LINKING AGENT'S USE OF RESOURCES

Befitting her own function of linking school site people with needed resources, the North Central linking agent availed herself of a good number of the resources and supports provided for linkage work. She seemed to reach well beyond her own boundaries, and often, to take good advantage of what was immediately within reach. In this sense, she might be called a "linker's linker." Three types of support are described here: Consortium Central, the agency, and linker-developed resources.

USE OF THE CONSORTIUM SUPPORT SYSTEM. Of this rich array of resources for linkers, she mentioned six types in particular that were most useful:

1. The network of Consortium linkers -- "The coming together of linking agents with common goals, needs, and understandings, and differences, has had an extensive effect on how I have worked with schools." She particularly liked the sharing sessions at Consortium meetings where she could get two or three perspectives or recommendations on a given issue, which for her meant "acknowledgement of each person's right to operate within the confines of his or her own style." While the milestones were the same for everybody, no single strategy or solution was prescribed, and Consortium Central accepted this notion as valid. This support helped her over the isolation hump at sites, where often she would ask herself if she was "doing the right thing." In addition, the sharing sessions helped her to sharpen her listening skills because everyone was "forced to listen actively, to give feedback to the person sharing the problem." Thus, one (perhaps) unintended outcome of the sharing sessions was to build linkers' active listening skills.

   In addition to the sharing sessions at Consortium meetings, the North Central linking agent frequently initiated phone contact with other linkers to ask for their ideas or for materials she felt would be useful. Two typical examples: Early in the project she called another linker to get a sampling of the issues that had arisen at his joining-up conference for site people so that she could anticipate concerns and plan appropriate responses for her own workshop. Later, she called another linker to get a copy of a survey administered at her sites which could be adapted for the North Central schools.

   She considers herself a part of a network of linkers, saying:

   > It helped to know that others were out there, doing the same kinds of things, worrying over the same problems, and able to understand and help me out, as I could with them.

2. Consortium meetings -- The linking agent found the training sessions at the twice-yearly meetings to be very helpful, recalling in particular her learning to use several R&D tools such as the Chalk Talk simulation game, curriculum organizer activity, and a curriculum inventory. Other sessions that proved memorable to her included David Crandall's discussion on skills training, a reading consultant's presentation on issues in reading, and Gene Hall's session on the levels of usage of an innovation.

   The value of the sharing sessions at the meetings is described in point 1 above.

3. Consortium Central personnel -- The linking agent considered the Linker Support Specialist to be very helpful, especially in the earlier stages of the project, for processing information and discussing possible strategies. She recalls a number of times when he not only provided a ready and "listening" ear

but also gave her many good ideas on what courses of action she might consider on such issues as gaining more access to teachers' time and building commitment on the part of a principal whom she felt was somewhat less than enthusiastic. He also wrote and distributed the Linkerland News, which for her was a fun way of keeping abreast of what other linkers were doing, and often inspired her to telephone to compare notes or ask for suggestions. The News also provided her with some feedback on how clearly she expressed herself in her contact reports, since it was developed from content written in linkers' reports. Reading about herself and her sites in the News gave her insight into how she could improve her documentation skills. Finally, she noted, seeing the site write-ups in the Linkerland News was "an affirmation that somebody was actually reading all of those contact reports!" The linking agent adds that while the linker support function was welcome and real during the first year of the project, by the time sites had selected a program, the focus changed to training and implementation issues and linkers needed different resources, such as developers, users, or agency personnel. Thus, the role that had been filled so ably became less valuable to linkers after the first year.

Early in the project, the Resource/Data Management Coordinator was "tremendously helpful" when linking agents were looking at the Consortium resource pool. She made many, many contacts with developer/demonstrators for them, sent out plenty of materials describing the products, was always available, and had a fast turnaround time on requests.

The Project Director was considered a good resource person, helpful in thinking through issues, though the linking agent admitted to feeling some relief when the Linker Support Specialist took over this function, since she "found it difficult to talk about site problems and negotiate budget items in the same breath." She compared it with the situation of a principal offering "help" in the classroom, while obviously performing a simultaneous monitoring function.

Another resource person, though not on the Consortium Central staff, was a staff member of the Northeast agency. The linking agent found it especially helpful to set up a conference call between him and one of her multi-constituent groups to discuss the pros and cons of two reading programs they were considering, both of which he knew very well. She says:

> One reason it was so good was that he was someone who knew the content of both programs, was also a process helper, and didn't have an investment in their selecting one program or the other, as a developer would.

4. <u>The Tool Kit</u> -- The linking agent believes that it's important to have support in the form of printed materials to supplement consultant help. She found the contents of the Tool Kit to be

on target and useful, and tended to use them by pulling a whole section on a topic and thumbing through for particularly good articles. Her wish to know its contents fully and intimately so that she could turn immediately to the "right" entry didn't mesh with her time constraints, though. She said that other agency staff members have also found the Kit to be helpful, and they borrow it from time to time.

5. Documentation -- This is a double-edged sword, since its heavy time requirements make it a constraint as well. But the North Central linking agent found that having to complete contact reports (more so than the other types of documentation also required) provided her with three benefits: (a) another means of inter-office communication, (b) a method of reflecting about site events, and (c) a way of venting her frustrations with sites. While she believes this last benefit may have "caused uneasiness at Consortium Central, where incidents probably looked bigger than they were," the ultimate effect was to provide her with experience in knowing what was important to document and what wasn't.

6. A budget -- The fact that she had a budget was considered a real resource by the linking agent because it permitted her to release teachers for meetings, training events and site visits, and to plan and conduct workshops.

USE OF AGENCY RESOURCES. There were three main types of resources named by the North Central linking agent:

1. The agency supervisor -- The linking agent noted:

> It has helped me, as a linking agent, to have another person on site who is involved with the Consortium project. I feel that the design of the Consortium is good in that regard. It means another staff person has a high investment in the project and is able to add ideas, different perspectives and support as strategies are planned and decisions are made. This exchange of information and ideas is valuable.

The linker has actively used her supervisor as a resource: they would meet bi-weekly for one to two hours to discuss the sites and possible strategies, for which the supervisor had prepared by reading all of the contact reports. In addition, they would schedule between-time sessions as needed. The supervisor sat in on some site meetings, met some of the teachers involved, and worked with the linking agent on the state-wide conference. She also has shared work on developing budgets, problem identification statements, and implementation plans for the sites. The linking agent discussed problems with her supervisor more frequently in the first year, moderately during the second, and less so in the third year of the

of the Consortium project. Speaking of her supervisor, the North Central linking agent says:

> She takes a very supportive role in practically all of the projects here. I've had a lot of latitude and as much autonomy as I've wanted, but she's always been available when I needed her. I feel I've gotten more than 20 percent of her time.

2. Other agency people -- The linking agent takes an active part in the agency's bi-weekly meetings, which provide a forum for staff to share information and problems. In addition, there are regular teacher center meetings in which she participates. A staff matrixing plan at the teacher center earmarks 20 percent of a staff person's time for collaborating with other personnel on their projects. The North Central linking agent has used this to good advantage, e.g., by scheduling the director of the teacher center to do a seminar on leadership and management skills at one of her conferences, utilizing National Diffusion Network state facilitators' contacts and materials, conferring with university faculty, sponsoring joint workshops with other agency staff.

3. The agency reputation -- The teacher center and its dissemination unit are known to educators in the southeastern part of the state. They command respect and thereby lend legitimacy to the linking agent and her activities. This air of legitimacy and trustworthiness has eased the linking agent's entry into school sites and bolstered her interventions.

USE OF LINKER-DEVELOPED RESOURCES. The linking agent built her own resource pool. For example, at her sites she cultivated support among school people:

1. Key contact person -- At each site, and in addition to the principal, the linker identified a key contact, someone who was well known and trusted by the rest of the school staff, enthusiastic about the Consortium project, willing and able to assume additional responsibility for carrying it out. The key contact person was instrumental in setting up meetings, handling logistical details, whipping up staff members to complete expected products, and, not incidentally, providing feedback to the linking agent on the tenor and direction of meetings, linker strategies, and teacher expectations. Obviously, this had to be a well-connected person and one with whom the linking agent could work productively.

2. Inside linker -- At one site a new role of curriculum coordinator had been created the same year that the Consortium project started. Aside from the areas of potential turf conflict between the two linkers, the linking agent saw this person as

a valuable resource to her: he knew the staff well, having taught at the school with which she was working; had secondary teaching experience (most of hers was in elementary schools), which could help with curriculum decisions; had contacts with the central office administration, where he was housed; and might be useful in securing additional funds to help support the program later on. She invited him to all of the meetings of the multi-constituent group, made a point of briefing him on those that he missed, sought his advice, and included him in decision making. She thus cultivated him as an ally.

In addition, the linking agent viewed her work at the school sites as another opportunity to apply her process skills, an occasion for putting theory into practice. Thus, the sites became a resource to her for developing her own area of expertise.

Furthermore, when this linking agent felt the need for a particular type of training or experience, she didn't hesitate to seek it out. For example, she took a refresher course in reading so that she could immerse herself again in those issues and gain a better perspective on the needs and difficulties of the teachers at the sites. At another point she participated in workshops on small group processes to sharpen her skills. It was probably at her instigation that Consortium Central allocated for the second and third years of the project a line for professional development, funds that could be used for attending education functions such as the annual American Educational Research Association meetings or reading association conferences. She refreshed herself on Northwest Lab's RUPS (Research Utilizing Problem Solving) training, which she had studied before her involvement with the Consortium, and called upon particular areas of her teaching experience to aid teachers during the implementation stages.

●●● Observations on the linker's use of resources: The general sense of this linking agent is that she eagerly sought new techniques, information and ideas to build her own repertoire of skills and knowledge, and that she attempted to utilize as much as possible those resources that were readily available. She formalized the role of key contact person and spent energy in developing and maintaining the connection because it was a valuable resource to her.

THE NORTH CENTRAL LINKING AGENT IN ACTION

For the first two years of the project, the linker spent most of her time (budgeted at 80 percent, but probably ended up using more than that) on Consortium work, giving some help to other projects at the agency when she could. During the third year she has worked formally at 20 percent on another project and found it difficult

to balance that workload with Consortium requirements. It bothers her when other agency staff refer to her "luxury of working with only four schools" because they don't understand how time consuming and enervating it is to work over long periods of time with school staff to get a quality program in place. She points out:

> With the state facilitators, the school usually comes to them with a problem in mind. They don't go through site selection or problem identification; they help them to select a solution. After the school adopts, they may check up and help with training, but they're not in the school, handholding.

She estimates spending roughly two days per month at each of her four sites during the first two years, a figure which varied according to events at the schools. For example, during the initial training for implementation, she would be on site the whole week and then return the following week to help teachers get started and to work out tangles. She says:

> When they need you, you have to be out there. And I have an advantage that some other linking agents don't: the farthest school is only about 50 miles away, so if I'm needed I can be there every day for a week.

The third year has shown a decrease in the amount of time spent at sites, probably more like one day per month each, as sites have routinized their implementations and there has been less call for intensive intervention.

To understand what it is that the North Central linker did in working with school sites, this section will examine her activities according to the five major phases of her work: entry, problem identification, program selection, training and implementation, and disengagement. These phases are derived from the 16 milestones which comprise the task flow for the Consortium project linkers (see Appendix for list of milestones). Her work at two of her four sites will be described in some detail: Mitchell, a suburban junior high school, and Cramer, an urban junior high school.* Short descriptions of each are in order.**

THE SITES. The Mitchell school is located in a suburb populated by airline employees and middle managers of several local computer companies. School district enrollment has stabilized and there is now a focus on curriculum coordination and staff reduction. With

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* The names of both schools are pseudonyms.

**Descriptive data on the sites have been gleaned from the case studies prepared by Ruth Anne Olson for the Consortium Report Series. They are recommended to the reader seeking more detailed information on the sites themselves.

a staff of 65 teachers, Mitchell, one of two junior high schools in the community, serves over 1200 students in grades 7-9 and has a minority enrollment of less than 1 percent. It does not receive Title I funds. Olson describes the school as a "friendly place [where] people appear to take pride in making the visitor feel welcome" and notes that music, rather than a bell, signals the changing of classes. Important areas are labelled in three languages, e.g., the water fountains are marked "aqua, eau, and wasser." Teaching is divided into interdisciplinary areas, which, according to the principal, has not proved to be an entirely successful organization, since the teachers have a tendency to retrench along department lines. For example, in the language arts/foreign languages area, the teachers of the latter subjects resent the fact that an English teacher is the area leader, claiming him to be unsympathetic to their needs.

Cramer is a junior high school located in a city of approximately 400,000 people. As in many urban areas, the schools are beset with problems of declining enrollment, inflation, and the need to mount more programs mandated by state and federal legislation. Desegregation remains a tough issue, since the schools have been under court order since 1972 to comply by meeting defined percentages for both students and staff. In spite of a city-wide plan to encourage integration by providing choices among a number of alternative programs for elementary school children, a federal ruling in 1975 called for the establishment of mandatory boundary lines in order to lower the minority percentages in some schools. Built in 1922, Cramer is a 7-9 school with a staff of 35 teachers and an enrollment of about 600 students. Minority students account for 49 percent and most qualify for Title I assistance. Two-thirds of the student body are eligible for the free lunch program. Discipline is a troubling issue at Cramer, as evidenced by students' increased use and selling of drugs and the number of physical attacks against staff. A variety of special programs have been undertaken, including a motivation program for seventh graders, two pull-out programs for academic and adjustment problems, an inservice training model developed as part of a Teacher Corps project involving the whole staff, and four special reading programs.

SITE SELECTION. As mentioned earlier, the linking agency each year distributes an interest update survey to determine schools' needs. From those schools that checked reading as a target area, the agency director and the state facilitator selected Mitchell Junior High School as a suburban school they would like to include in the Consortium. They contacted the school principal in the spring of 1976 to determine Mitchell's interest in participation. The principal recalled to Olson in a case study interview that he had only 24 hours to respond with a statement of need and supporting data. He, the district language arts coordinator, and a reading teacher prepared the statement, not having time to involve other staff, for what appears to be a

purely opportunistic motive: "We're always interested in getting money," said the principal. The linking agent played no role in the selection of Mitchell as a site.

Finding an urban site proved to be much more difficult. Exploration with six different elementary schools in the city during the fall of 1976 netted zero, basically because they were already involved with other programs and didn't wish to over-extend themselves. During this time the linking agent expended considerable energy in meeting with district administrators, curriculum coordinators, and state and federal program coordinators, as well as with various principals and staffs before several people suggested that she might focus her search on junior high schools since elementary schools were caught up in training and implementing a new district-wide reading program. Thus, it wasn't until December 1976 that Cramer Junior High School was contacted, putting the linking agent "behind" in her projected schedule. The Cramer principal had worked at the linker's agency during a sabbatical in 1974-75, so he and the linking agent were known to each other. A meeting was set for them and a reading teacher for 16 December to begin planning.

At both sites it appears that the principals were central to the decision to become part of the Consortium project, although staff participation in the decision varied.

●●● Observations on the linker role during site selection: At Mitchell, the linking agent, as noted, played no role in its selection for participation. In selection of Cramer, however, she assumed major responsibility for identifying a pool of potential sites, exploring the possibility of participation (and its implications) with a number of interested people invested in the success of other district programs, and finally arriving at Cramer as a suitable choice. This initiating role thus contrasts with her lack of involvement with the selection of Mitchell.

ENTRY. The North Central linker's first contact with the Mitchell site was her meeting in August 1976 with the district language arts coordinator, who had served as the language arts/foreign languages area leader before assuming his newly-created district post. He saw the Consortium as a means for adding the area of reading to the language arts curriculum and of broadening teachers' skills. He had two recommendations regarding membership of the multi-constituent group: (1) include the resident reading expert, and (2) drop the notion of involving parents, since their district bred "ax-grinders" and it was not the style of the district to work with parents on educational planning. Soon afterward, the linking agent met with the principal and with the new language arts/foreign languages area leader, from whom she learned that the Consortium would probably work with 12 or 13 teachers in the

language arts area. The area leader suggested that this staff would want to see the R&D products right away and that the linking agent might present them at the first meeting. A date was set for the linker to meet with key people.

The orientation meeting was held 14 September 1976 in the auditorium at 7:20 a.m., and was attended by 15 teachers, the district coordinator, principal, two reading teachers, and a public relations representative from the district. The linking agent made a brief presentation of the Consortium project and handed out copies of an overview statement, a list of the 40 R&D products in the Consortium pool, and a list of states and school sites participating in the project, all as a means of providing a context for Mitchell's involvement -- a larger picture. Only a few questions surfaced in the reticent group before they dashed off to their morning classes. The linking agent noted:

> The teachers were poorly prepared for my coming; I sensed they felt things were being put on them....I don't think they feel much ownership at this point because the administration made the decision to participate without consulting them.

After this meeting, the linker met with the area leader to set up the individual interviews with teachers. At that time, he again emphasized that time couldn't be spent on "philosophical approaches to problems; teachers want to see products." From the interviews conducted on 21 September 1976, the linking agent learned that the teachers had very little experience in working closely with outsiders and that she should be conscious of time considerations as well as allowing teachers to make their own decisions about involvement in the Consortium. She identified the four "opinion-makers," one of whom was the district coordinator, and was told that the principal "likes the 'buffer' of a team leader who communicates ideas to the staff."

The site followed the linking agent's recommendations on membership in the multi-constituent group, with the exception of a parent representative. The first multi-constituent group meeting, held on 7 October 1976, typically marks the beginning of the problem identification phase, but at Mitchell it remained an entry issue. Using the Consortium project description and a list of concerns generated in the teacher interviews (such issues as the need for a unified program, training in diagnostic/prescriptive/remediation principles, a program that would fit into the existing curriculum, and content characteristics such as the use of good literature and a step-by-step skills ladder for student mastery), the linking agent asked the 18 members present to pair off and identify the three most important needs at Mitchell. As they were examining their choices and combining them in the large group, the 45-minute session ended and teachers had to leave to meet their first classes for the day.

At the follow-up meeting with the principal, district coordinator, and area leader, the linker expressed her desire for more meeting time, and the principal agreed to work on that by using substitute teachers for the next one, which they felt should focus on goal setting and membership issues. The district coordinator suggested that the linking agent not attend the meeting, saying that "the meeting would be less artificial." The area leader wanted her to be there, and the principal was uncommitted to either point of view. In the end, the linking agent somewhat reluctantly agreed not to come, believing that the teachers needed to build ownership of the project first, but indicated that she wanted updates on what happened at the meetings she would miss.

At Cramer, the linking agent's entry was less bumpy. Her first meeting with the entire English faculty, consisting of seven teachers, occurred on 2 February 1977. She provided a similar orientation to the Consortium project as that offered at Mitchell, and learned of some of the teachers' concerns. Mostly they focused on a fear of getting involved in too many programs, since they already had three other reading programs at Cramer. That the reading specialist chose this opportunity to announce that he and the principal were writing a proposal for Title I funds to extend the elementary reading program into the junior high grades the following year didn't help much. Interestingly, when the linking agent reported the teachers' concern to the principal, as she'd promised them, his response was unruffled. He said, "students need as much help as they can get and that may mean seven or eight new programs." At the meeting, it was decided to invite a parent representative to join the multi-constituent group. A schedule for individual teacher interviews was set as well. It was a fairly uneventful meeting, but the linker came away from it with a good sense of what she needed to do with these teachers. She listed three "useful" tasks to focus on, calling for her to help them broaden their perspectives on new programs, see correlations of their current reading programs with a new one, and accept the fact that one program wouldn't meet all of their needs, that a variety of approaches were necessary.

Several days later, the linking agent met with the district superintendent to seek local matching funds for the Consortium project and to inform him of the group's decision to invite a parent representative, who also served as the district's public relations coordinator, to join the multi-constituent group. He suggested that matching funds might come from Title I initially and then from staff development or his office's funds. He also advised including a Title I staffer in the multi-constituent group. Together, the linker and the superintendent wrote a statement of need and a budget for teachers' released time, supplies, and consultants, which was approved by the Title I coordinator in March 1977.

●●● Observations on the linker role during entry: The linking agent's entry into the Mitchell site seemed to have bumped

into the district coordinator's notion of how this project would fit into the district. He called for an in-house meeting to overcome the effects of the outsider (the linker) on group discussion. While it is a frequent strategy of newly formed groups to define themselves and get themselves together to face the outside world as a united force, it is well to keep in mind here also that the district coordinator, as the previous language arts area leader, may have had some difficulty in letting go of "his" teachers to an outsider. Furthermore, being new at his district position, he may have needed some time to carve out his own role and thus could have viewed the linking agent as interference. "Threatened is too strong a word," said the linker. "It sounds negative, but I think he probably did feel a little competition." She continued:

> When I returned to the school, one of the teachers asked why I hadn't come to the other meetings and I replied that, as I understood it, it was important for teachers to spend some time backing up and looking at the original decision to be involved with the Consortium project. He said he didn't think that was the problem. To what extent he was in touch with others, I don't know. But to me, it meant that maybe the district coordinator viewed an outside linker as somewhat threatening to setting up his own role as inside linker.

The above comment is made from a hindsight view. At the time, though, the linking agent was willing to suspend judgment on possible motives and to accept an insider's notion of what would be best for the multi-constituent group at Mitchell. In a sense, she let go of her initiator's role to take a backseat, responsive role, for what she hoped would be the good of the group.

At the Cramer site, the linking agent seemed to take a more directive role, though this may be a perception owing as much to situational differences as to her having been through the entry phase on three previous occasions at her other sites, and perhaps feeling more at ease with initiating activity on others' turf.

The Consortium linker role, after all, is that of an outside consultant. The linking agent notes that even now she's still an outsider because she's not a part of the staff and doesn't have to "live" in the school situation. While she's trusted now, as an objective helper with inside knowledge, she's still outside of the mainstream. She had (as do all outside linkers) to build that level of trust from the moment she stepped into their world, and the means by which she did it was to establish contact on a one-to-one basis with the administrators and the teachers.

PROBLEM IDENTIFICATION. This is often a difficult stage for busy school people to take time to do properly. The usual tendency is to rush headlong into the land of solutions and to pick one that looks "right." Mitchell and Cramer were no exception. They both pressed for looking at the R&D pool of programs; administrators warned about keeping the meetings productive in terms of content. The linking agent wrote in her contact reports of "being pushed" and having to "slow them down to go through the process." A curious contradiction in people's memories emerges in the Mitchell site: in the case study interviews, staff people almost unanimously reported to Olson one complaint about the linker, that she led them down paths to programs before they even knew what their problems were. "Every time we turned around she had a new program to show us before we even identified problems." The staff's view is even harder to comprehend when one notes that the linking agent had only two meetings with them (first an orientation, and second the beginnings of a needs assessment) before she was asked not to attend meetings for awhile. Upon her return, they insisted on looking at programs.

It should also be noted that both sites were somewhat unusual in terms of the rest of the Consortium schools: they were junior high schools and the bulk of the R&D pool from which selection was to take place were elementary school programs. Perhaps school people wanted to look at the R&D pool early in order to determine if there was anything there to justify an intensive working involvement with the Consortium project.

During her absence from Mitchell, the linker kept in touch with them by telephone to check on progress. There had been two all-day meetings of the group on 14 and 15 October, made possible by the principal's arrangement of scheduling and substitute teachers. Reports from the district coordinator, the area leader, and the reading teacher glowingly described the progress made by the group in dealing with such issues as:

- Establishing selection criteria (they identified 19)
- Program characteristics
- Designated versus actual leaders
- Produced leadership within the group
- How to pilot models
- Implementation of a new program
- Underpinning philosophies

With test scores showing 40 percent of all seventh graders below level in reading, the group decided that their priorities were: (1) to work first with seventh grade slow learners, (2) to work

next with all seventh graders, using more language experiences, and (3) to review and adapt the program for all grades. The district coordinator prepared a four-page statement of the proceedings of these meetings and circulated it in early November to participants for feedback on its accuracy.

In mid-November the area leader called the linking agent to invite her to meet with the steering committee on 23 November at 7:30 a.m. to set the stage for matching their criteria with a reading program in the Consortium resource pool and to close the gap between the staff and the linker. The area leader, appointed project coordinator by the principal, opened the meeting by sharing with the linking agent the revised statement of need and criteria. The linker noted:

> Teachers are anxious to see materials and not spend any more time with problem-solving sessions. I need to get materials that go beyond awareness. They need teacher and student manuals if they are to evaluate programs.

Cramer site people also pushed for early examination of the R&D resource pool. In addition, two group members had attended an awareness workshop on Scott-Foresman materials and pressed others to consider adopting the commercial program. The linking agent, aware of being interpreted as someone interested in helping them solve their problems as long as they chose a solution from her pack, suggested that once they had selected criteria for a reading program they might apply them to the commercial materials too. A half-day meeting was scheduled at the English chairperson's home for 29 March 1977; it was to be a potluck lunch meeting aimed at developing group planning skills, defining program criteria, and if time permitted, looking at some of the R&D programs. Teachers were to bring completed teacher surveys, which the linking agent had distributed earlier as a tool for them to rank their concerns. This teacher survey was adapted from one used by another linker.

At the meeting, teachers ranked their concerns from the surveys, and then the linking agent handed out copies of a worksheet on defining curricular problems, which asks users to specify instructional areas, students, and behaviors, and to write explicit problem statements according to an existing state and a desired state format. These materials had been used by another linking agent as well. The meeting was spent in ranking teachers' reading concerns (student attitudes about learning was #1), reading the handouts, pairing to select existing and desired states of student outcomes, listing causes of students' poor attitudes, discussing the difficulty of selecting suitable materials, and deliberating the use of R&D programs versus commercial products. The linker reported that she "was very pleased with the progress that was made," describing the experience as "a very open, relaxed, and profitable meeting." In a report to Consortium Central, she listed the group's identified basic priorities as meeting the needs for:

- Materials for underachievers that are of high interest to secondary students and at the same time including an intermediate (5/6 grade) level vocabulary
- Ways to encourage students to read independently for enjoyment
- Assistance in reading in content areas
- Developing students' motivation and skills in independent learning
- Individualizing the reading program

It appears as though most of the basis for determining priorities came from teachers' perceptions of reading and motivation problems, although it is mentioned that test scores, teacher and administrator interview data, and information from the Title I office also played a part.

●●● Observations on the linker role during problem identification: The Mitchell site moved through the problem identification phase with little or no help from the linking agent. She didn't discuss her reaction to their work, other than to point out to them that their criteria were highly idealistic and that they were likely to encounter difficulty in finding a program that would meet them all. While her concern during her absence from the group involved whether or not she could mesh with them upon her return, it seemed to have faded in the face of the immediate issue of getting on with the work: since the site had identified its problem, teachers needed materials and programs to explore. She seemed to go into high gear for her approaching role of information linker.

In contrast with her experience at Mitchell, the linking agent appears to have taken a leading role in the problem identification phase at Cramer. She stands out as being confident and able to guide the group through the steps of the problem identification process, though she tended to underestimate how much time it would take for the group to move through them.

PROGRAM SELECTION. The linker was particularly active in providing the sites with what they needed to make an informed decision on which program to adopt. At Mitchell she identified seven Consortium programs that fit the group's criteria and helped them to develop a matrix that weighed the programs against their criteria. She obtained information about each of the programs and orchestrated a reporting system in which one teacher examined one program in depth, filled out the curriculum analyzer matrix, and reported the findings to the rest of the group. The linking agent

obtained more descriptive information on some programs, and when the choice was narrowed to two programs, she contacted the developers for information on training, costs, and follow-up. She also got in touch with secondary school sites which were using the programs to discuss their experiences and to arrange site visits by Mitchell staff. In addition, she arranged conference calls to program users so that the multi-constituent group could speak directly with them about the program. Finally, she prepared summaries of both of the programs for the Mitchell group.

During April and May the group focused their investigation on the two programs in question. Seven teachers attended an awareness workshop on the first program, and two teachers visited a user site to see it in action. A series of telephone calls, both private and conference, were made to developers, users, and others familiar with both programs. But, no awareness workshops were available for the second program, and a site visit was not possible either because users did not feel ready to receive visitors.

Throughout this exploration activity, the linking agent noted that the group seemed to be leaning toward a program with a strong teacher training component, even though their criteria had indicated a marked preference for materials-rich program. By the end of the school year, the group decided to adopt a program that, according to the linker, "was not a solid match on the matrix."

Their decision appears to have been made for all the wrong reasons. Olson, in her case study interviews, learned from teachers that the most influential reason for selecting the first program over the second was the fact that two teachers saw the former in action, and no one saw the latter. As a matter of fact, the group had much more information on the first than on the second, and presumably it was positive enough for most of the group members. Because the name of the second program included the word "vocational," some people were uncomfortable. Others felt that it was too narrowly focused on vocational vocabulary, whereas the first program dealt more broadly with the language arts. Judging from the matrix filled out by the teacher who had originally examined the program description and reported his results to the whole group on 24 January 1977, the selected program was "not applicable" on 10 of the 19 criteria, "unknown" on 6, and "checked" on 4 (the total is 20 because one of the criteria had more than one part). The good sales pitch, as described by the linking agent, of the selected program's developer may also have played a large part in the group's decision to adopt. Of that decision, the linker withheld judgment, pointing out instead her view that decisions aren't good or bad, they simply have different consequences.

The selection phase began well enough at Cramer: the linking agent recorded the nine criteria listed by the multi-constituent group and then selected 11 Consortium programs that fit them. She began getting detailed information about the programs and

arranged for three teachers to attend an awareness session on one of them, the one which Mitchell later selected for adoption. The teachers and the Title I coordinator were so impressed by the developer's presentation that they believed this program was the answer to the reading problems in their school, and even in the whole district. The linker arranged for one teacher (the only one available to make the trip in July) and the Title I coordinator to visit a demonstration site. They came back from their visit disillusioned, calling the program "awful" and "dehumanizing." As far as they were concerned, the program should not be considered for adoption.

The selection process, carried into the fall, seemed to become counterproductive: said one teacher, "the more we looked into the programs, the more we realized that we didn't need a new program." Whether the staff was discouraged by the slim choices of the Consortium pool, or by the whole selection process, or by the difficulties of getting together for meetings since the new scheduling for junior high schools took effect, their interest evaporated by late fall. Meantime, declining enrollment caused Cramer to lose one English teacher, though Title I funds allowed her to remain by shifting to reading. Other circumstances, such as the impending involvement with a Teacher Corps project, served to distract staff even more. The linking agent struggled to keep the project alive by continuing to schedule meetings, bring materials for the group to examine, and arrange visits by program representatives. A three-hour meeting was scheduled for 24 January 1978 and appeared to have a "make it or break it" quality: a program decision had to be made. The linker noted, though, their dilemma:

> The district is making a lot of changes, and the teachers here are wondering if their school will even exist next year. This makes it difficult for them to focus on long-term planning. And these are teachers with at least 8 years' service!

By the end of the meeting, the group, having studied, opined, and problem solved, decided to adopt the management system, diagnostic testing, record-keeping system, and parts of the materials of one of the two programs they had been considering. They made two modifications: (1) they would implement 2-3 days per week, instead of daily, and (2) rather than hire a special reading teacher to organize the Reading Center, the English teachers on staff would take on the task. The group selected two days for training in April.

The viability of this choice got lost in the coursing events that swept the district, catching up Cramer in the midst of it all. On 30 January Cramer was informed that it was to be included in the new plans for desegregation, which meant one of three things to the school: (1) only eighth graders would attend Cramer the following year, (2) it would close for renovations and reopen as a K-8 fundamental skills school, or (3) the school would close permanently. The staff lived with this uncertainty until the end of the school term.

The linking agent kept in touch with the Cramer staff during the months of uncertainty. She not only phoned and visited but also attended a Board of Education hearing on the desegregation plan and kept abreast of news happenings. At the end of May the federal judge ruled that the school district must achieve full desegregation by the fall of 1978, and the Board of Education voted to appeal and to request a stay of the compliance requirement. Only one thing was certain in this whole miasma: contingency plans must be made, for the future of Cramer staff and students, as well as of the Consortium project at Cramer, remained very much in the air. Training and implementation of the selected program were viewed, of course, as completely inappropriate.

A decision was made by the district to close Cramer and reopen it in the fall of 1979 as a K-8 fundamental program.* The linking agent surveyed the situation and decided that it would make most sense for the Consortium project to move, along with the students for whom the program was chosen, to Morse Junior High School.** Another reason was the transfer of the English Department chairperson to Morse in September 1978 and her continued interest in working on the Consortium project. So, in June 1978, the linker obtained approval from the district area superintendent to move the Consortium project to Morse. While the Morse principal was not willing to make a firm commitment in June about accepting the project, he invited the linking agent to come to Morse in early September to pursue the matter.

With the formation of a new multi-constituent group at Morse, including two previous Cramer participants (one was a parent), the Morse principal, and reading, English, and Title I representatives -- a total of nine members plus the linker -- the Consortium project officially moved to Morse Junior High in late September 1978. The linking agent provided information on several reading programs the group could consider, and the previous English Department chairperson from Cramer discussed the reading needs of the transferred Cramer students. Thus, the problem did not have to be reidentified, only the process of program selection was to be carried out again. At the 4 December 1978 meeting, attended by several other teachers as well, the group chose the same program that the Cramer group had. A sub-committee was formed to work out details of training and materials, but they decided to delay implementation activities until the new Title I teacher came in January to fill the Reading Center post. The linking agent, worried about using the Consortium funds before the project ended in

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* Descriptive data on the sites' third year have been gleaned from the epilogues to the case studies prepared by Holly Gunner for the Consortium Report Series. They are recommended to the reader seeking more detailed information on the sites.

**The name of the school is a pseudonym.

June 1979, quickly arranged and conducted a meeting including the new Title I teacher and a representative of the program the Morse group had selected. The new teacher was supportive of the new program -- she had inherited a post but no program or materials -- and with the linking agent, ordered materials, which began arriving in late February and continued until at least mid-May.

●●● Observations of the linker role during program selection: The linker took a direct, initiating role in connecting school people with resources for making a program decision and in aiding them with the decision-making process. What seems to emerge, curiously, are the linker's simultaneous close, caring support and involvement with both sites plus her tendency to remove herself from their arena, even to the point of not expressing opinions about their choices in her contact reports. To be sure, she viewed herself as a non-voting facilitator of their work, involved more with their process than with content; but the extent to which she goes to distance herself from that content seems to be at odds with her earlier perceived role of technical assister which called for her to "learn about the group and its situation so as to judge the fit of various programs being considered" [emphasis added].* The lack of data on the linking agent's view of how well programs matched needs may also be a function of her preoccupation with the cataclysmic events shaking the Cramer site, though this would not have affected her treatment of the Mitchell site.

At Cramer, needless to say, the linking agent provided the thread of continuity and the impetus to press on during the change of schools, multi-constituent groups, and administrators. As an outsider, but perhaps perceived by Morse staff as an "insider" in that she had more information and a guiding hand in Consortium doings, the linker possessed the political cachet to push, gently as is her style, the Consortium project at the new site. Thus, the initiator role played an equally important billing with those of process enabler, information linker, and resource arranger, if not even more so. Without her concerted efforts, the Consortium project would have dropped from the annals of this urban setting.

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* Upon reading this, the linker felt it more accurate to say that she maintained a critical balance between facilitating and advising: as an outsider, she chose not to interfere with a decision, but as a helper, she wanted to give professional aid. "Not ever unbiased," the linking agent preferred to point out implementation problems of particular programs, to bring group members to an awareness of the consequences they might anticipate before making a final decision. She felt "all choices were OK; I thought they'd be less pleased with some, but not to the point of outright dissatisfaction."

TRAINING AND IMPLEMENTATION. At the Mitchell site, the linking agent took active charge to ensure that staff received training and subsequent implementation help. In June 1977 she arranged for the area leader and a reading teacher to attend a two-week training session which was geared to secondary school users of the program. The linker also took care of logistical details, such as travel and hotel arrangements. In addition, she handled details for obtaining graduate credit for their participation in the workshop.

Soon after school start-up in the fall, the linking agent arranged for a five-day training session at the school by a program trainer. She coordinated with the principal on items such as releasing teachers, arranging space, inviting teachers from the other junior high and the senior high, and developing a public announcement of the training event.

Implementation during the fall of 1977 proved to be frustrating for many of the Mitchell teachers, who complained of the inordinate amount of time required for preparing materials, time they simply did not have. Though they liked the active method utilized by the program, and described it as goal-oriented, organized, and able to achieve results, they could not block out enough time to do it justice. The linking agent, who had maintained close touch with the implementing teachers, circulated a short questionnaire regarding convenient times for a follow-up training session and made arrangements for a demonstrator/trainer, who was recommended because of her training abilities and the fact that she used the program in her own secondary classes, to come to Mitchell for two days in February 1978. She honored the teachers' request that the sessions focus on demonstration rather than observation, since the teachers didn't feel ready to be observed and believed they could learn more from seeing an experienced user in action. The event was a great success because the trainer was highly skilled, enthusiastic, and familiar with the adaptations needed for using the program with secondary students. After the training, the incidence of teachers using the program's techniques increased. The linker noted that one more training event, probably in the summer, would be needed to get this implementation into place.

Throughout the spring of 1978 Mitchell staff became discouraged, however, with the program and its implementation. After the hustle and bustle of planning, selecting, ordering materials, and training, the teachers now had to settle down and do it -- and "it" was a big, demanding job. The contrast between the periods of planning and of implementing must have felt tremendous. One teacher dropped out of the project, stung by the district's decision to shift his own instructional skills course from a requirement to an elective. Perhaps unfairly, he judged the Consortium program as existing only because it was buoyed up by outsiders (the linking agent and the case study researcher). The district, in the meantime, was cutting staff and transferring some to the high school, a fact that was not lost on the Mitchell

teachers. People didn't know where they'd be, and that affected their willingness to put in extra time on a difficult program that they might not be using the following year anyway.

The linking agent continued looking for ways to ease the teachers' burden with the program and presented them with several options, including: (1) released time to work on materials preparation, (2) summer compensated time, (3) clerical help for preparing charts according to teachers' specifications, and (4) graduate credit from a local college. They all chose option (2).

By June much of the district shake-up had occurred, resulting in the elimination of three positions at Mitchell (the area leader, a reading teacher, and an English teacher). The principal moved one reading teacher to the high school in order to keep the other (who also had been quite active in assuming responsibilities for the Consortium project). The linker viewed the transfer of the area leader to the high school as a potential means of diffusing the Consortium program to another school, since he was a strong supporter of it. With their immediate futures settled, teachers were able to turn their attention back to implementation. The linking agent planned a three-day summer workshop for seven teachers to prepare materials for the fall. A one-week workshop was also conducted in January 1979 for new teachers at Mitchell and staff from other schools inside and outside of the district. By the end of the third year of the Consortium project, all but two teachers in the language arts area were using the new program to some extent.

During the implementation period at Mitchell, the linking agent visited the school and the classrooms roughly once a month, and called several group meetings for informal discussion of implementation progress, teachers' needs, evaluation, and methods for extending the program to other departments, according to Gunner.

At Morse, training and implementation activities were being held at bay by the general instability characterizing the school. The linker, as noted earlier, ordered materials which arrived all through spring. She arranged a training session for the Title I teacher for January 1979, when the program trainer was planning to be in town for another event. It appeared that this Title I teacher was to be the only implementer of the program. She was scheduled to work with about 30 students reading at the third or fourth grade level, and used a diagnostic/prescriptive method plus a reward system for building student self-esteem. She was unperturbed by bending the program to suit her (and her students') needs. Her main concern was finding enough materials for students, and in this area the linking agent was a godsend. The linker worked steadily with this teacher to help her get started and to get the Consortium program in place and ironed out before the funding stopped.

Not surprisingly, perhaps, the Title I teacher was scheduled to be laid off for the 1979-80 school year, and it seemed unlikely that she could return to Morse anyway because of her seniority level. Thus, once again, this site's upheaval unearthed all of the seeds of the Consortium project. The identity of the Title I teacher's replacement was not known, nor was the fate of the Consortium program. Whether or not the program will be embraced, or at the very least, tolerated, was left until the fall.

During the spring of 1978, the linking agent planned and conducted a state-wide conference for her four sites as their first get-together. Two sites were implementing on a full-scale basis, one had started operating a part of their program, and the fourth (Morse) hadn't begun yet. At the conference, each school site made a 20-minute presentation on what they were doing and then answered questions from other site people. Three other presentations were made, one on organizational and leadership management by the head of the agency's teacher center, one on reading assessment by a reading professor from the university, and the third on the overall Consortium effort by the Linker Support Specialist from Consortium Central. The linking agent was pleased with the amount of interest school people showed in each other's work, stating that she'd been worried about that because they were at different points in implementing their programs. Olson noted that the Mitchell school people got a "shot in the arm," much needed at that time, from attending the conference and seeing how well they were doing in relation to the other Consortium sites.

●●● Observations on the linker role during training and implementation: Mitchell teachers viewed the linking agent's most important function during their implementation period as helping new users of the program, but added that her continuing presence in the school during the third year encouraged all of the teachers: "There's a feeling of commitment when someone comes in from the outside," stated one teacher. Thus, the linker also served something of a maintenance and morale boosting function for the more seasoned teachers at Mitchell during her last year of involvement at the site. This role varies considerably from that of the other phases, in that it consists of what the linking agent might refer to as some "handholding" and encouragement, rather than direct guidance and linking with resources.

The role played by the linking agent at the Morse site was almost exclusively that of information linker and resource arranger during the last six months of the project, while during the move from Cramer to Morse, as noted, she emerged as a strong initiator.

DISENGAGEMENT. This activity phase is somewhat akin to following through in swinging a baseball bat or a tennis racket: if you don't do it, all that came before it, no matter how competently

performed, will be fouled. Actively planning for disengagement and creating mechanisms to assure ongoing maintenance of the program are essential for rounding off the whole experience. While the linker was well aware of this, she pointed out:

> One of the problems with the Consortium is its arbitrary timetable for disengagement. It's unrealistic to expect every school to develop at the same rate and to be ready to stand alone at the same time. They have their own rates and problems, and the difficulty of the program they select needs to be taken into consideration too. Morse, for example, is not ready for disengagement, but I don't have a choice.

At Mitchell, the linking agent began the process of disengagement around January, when she talked about the coming end of the Consortium and started to shift some responsibilities to site people. She knows that the principal would like her to visit two or three more times next year, which to her means reinforcing the importance of the Consortium to them, even though she fully expects the program to continue without her presence. Depending on her involvement with the State Facilitator project, she may or may not be able to extend her presence at the site. The site person assuming most responsibility for the program is the new area leader, who will also be there next year. The linker is confident in her ability to take over since she has already taken some responsibility this year and is very interested in maintaining the program. She will, however, have less support in the way of released time, and this might prove detrimental, given the heavy time requirements of their program.

To all of her sites the linking agent sent a letter explaining the State Facilitator project and pointing out that now that the Consortium is coming to an end, another way they might get information and assistance is through the state facilitators. In addition, she left catalogues of the State Facilitator project in the school offices for people.

She added that if she had more time, she would have had another follow-up workshop because the Mitchell program needs more technical assistance, maybe as much as two or three more sessions. While she believes that the program will continue without the additional help, more technical assistance would assure its vitality. Another activity, if she had more time, would be perhaps one more state-wide conference to give site people the opportunity to reflect on where they've been, the process they've come through, and where they'd like to head.

Disengagement at Morse, as noted earlier, is extremely premature as far as the linking agent is concerned. But given the imminent lay-off of the Title I teacher and the newness of the implementation, she and the teacher decided to leave as much behind as possible for the newcomer. So, they wrote a plan of action for the coming year, a set of recommendations, and a history of the

school's involvement with the project as well as an outline of events during the current year. All materials were labelled "Consortium" for the new teacher's use. A copy of the plan was left with the principal and with the materials. In addition, the linking agent discussed the matter with both the principal and the area superintendent on more than one occasion, communicating her hope that if the reading position remained open next year, it might be filled by the current Title I teacher. While both were sympathetic, they must follow seniority guidelines. The main problem the linker faced at Morse was having no one to whom she could turn over the reins. She is less confident of others in the school (the reading director, the principal) taking responsibility for getting the program going again. But the program trainer offered to return to the site to train the new teacher, perhaps absorbing it in his own budget.

The linking agent is certain that Morse will call her in the fall when they get their new teacher, and she would like to try her best to return and help them get set up and going with the program.

Her view of disengagement is that "you never really do it, you never really leave."* Someone will always call and ask for help. She cited as an example one of the teachers at Mitchell who was transferred to another district. She called the linking agent right away to ask for help in preparing a replication proposal for her new district. When she was funded, she called immediately to share the good news.

The linker feels some sadness at disengaging from sites with whom she has worked for such long periods of time. She says:

> There's something personally satisfying about long-term work; I guess it's seeing results. I'll miss that kind of long-term involvement and level of ownership. It's much more rewarding than dabbling with bits and pieces of projects, or writing proposals.

She notes that she hasn't disengaged yet (as of mid-June 1979):

> I was in every one of my schools last week. I plan to be at Mitchell some time in the fall, maybe more than once, and no doubt I'll be at Morse too. It's a revolving door.

●●● Observations on the linker role during disengagement: The linking agent began the process of withdrawal from Mitchell early enough to reassure herself (and the school people) that

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* After reading this, the linker clarified the notion by stating that the agency will continue to serve the same schools because they're in the agency's state service area. The difference will be that it won't happen through the Consortium, may be done by another linking agent, and will occur with less frequency. "It's not the same as when a consultant finishes the work, and leaves the school completely. We'll still be around."

they could continue unaided with the transferral of program responsibility to the new area leader. Her letter to the faculty, while understated, provided some semblance of conclusion of the project. Morse, of course, remains problematic despite the linker's efforts to provide some continuity from this year to next. She justifiably notes that that site isn't ready for disengagement, and the future of the Consortium program adopted there will no doubt depend to a great extent on how much initiative and energy she can bring to getting the new person on board, since she hasn't much confidence in others taking on that responsibility.

Her approach from beginning to end of the three-year period was a fairly intensive intervention. The overall sense is that this linker takes an active interest in her sites; she can't abandon them, even when the project ends, and she makes plans to visit them again to make sure things are going well. It's almost as if she's unwilling to say goodbye. This intensity may result in the linker's remaining at a site beyond the point when she's needed, although this does not appear to be the case with Mitchell and Morse.

EFFECTS OF THE LINKING AGENT'S WORK

Asked to note the effects of her work on the sites, on her agency, and on herself, the linking agent offered the following possibilities:

EFFECTS ON SITES. Aside from the obvious one of getting a new program in place at each site, other effects included:

- Connection to another world, a resource that they could tap. Every time a developer came in, or someone from Consortium Central, or they visited a demonstration site, they got to see how other people work and think. With their horizons broadened, they could look at things in new ways.

- All of the evaluations I've gotten back from teachers point to closer working relationships among teachers on substantive issues, rather than logistical ones like, "when should we count the lunch money?" While such discussions are time consuming, I think on the whole they welcome the opportunity to share ideas. It's more professional.

- Teachers have been able to refuel their own energy levels by working with me and with each other. They bring new enthusiasm back to the classroom.

- There seems to be more teamwork among teachers, more willingness to help each other out, rather than to compete or close themselves off in their classrooms.

- Teachers had an opportunity to make decisions, and to learn that they could. It didn't always have to be the principal who decided. This strengthened their own sense competence, not to mention building their commitment to the decisions.

- Principals learned that teachers can make decisions if given the opportunity.

- At one site, I think that for the first time they had an opportunity to work with a minority professional person, who wasn't functioning as a teacher. It may have been a "stretching" exercise for them, a broadening of their view of the world and the people in it.

- The principals got to participate in the leadership training workshop that I set up for them as a means for joining up. I think the effects of this workshop may have had some bearing on how they worked with the Consortium over the three-year period.

- One school site, a non-public school, asked me to help them think through a proposal for state funds. The experience of submitting a proposal and having it funded was a real learning experience for them, as was the budget negotiation period. They learned that they could get money from the state for validated programs.

EFFECTS ON THE AGENCY. There were several:

- The agency's reputation has been enhanced, as evidenced by the teacher who changed districts and called us for help with a replication proposal, or the education director of the Archdiocese who called to say that he wanted to get more programs going with us since the experience at the _____ site was so positive.

- A principal who had participated in the leadership training workshop called our agency to ask the teacher center director to come to his district and train all of the administrators there. This represented a real spin-off from the Consortium work.

- The agency will share its expertise this summer in a three-week workshop on training urban educators for linking agent roles. Many of the strategies we'll use are things learned from our involvement with the Consortium.

- The State Facilitator project has asked me to do a short presentation on determining the levels of usage of an innovation, an area that I learned about at Consortium training sessions.

- The exchange of information between the linking agent and the supervisor in the Consortium project is recognized as valuable, and the agency director has asked that regular times be set aside for "bouncing" ideas, concerns, and information with other staff members. This is additional to our regularly scheduled meetings held on a bi-weekly basis.

EFFECTS ON THE LINKING AGENT. These broke down into professional and personal areas:

- Professional experiences with other agencies and other linking agents have broadened the way I think about my own work.

- Professional training that I received at the Consortium meetings sharpened my skills and made me more effective at school sites.

- I had an opportunity to practice in more depth the small group process skills and organization development theory I've learned.

- I think I do a better job of helping teachers, principals, all school people, than I did before the Consortium project experience. Being on site so often permitted me to stay in touch and learn about new areas of school life.

- People here at the agency refer telephone queries to me more frequently than they did before my Consortium experience, probably because they feel that I'm better able to answer particular questions.

- I'll be co-managing a program next year for bringing women and minorities into research. Probably my performance with the Consortium project, where I was responsible for managing my own work load, played a part in preparing me for my new position.

- I was included on the city-wide reading committee to get together and discuss such issues as testing, minimum competencies, Title I, ESAA, federal and state programs, and city-wide objectives because of my involvement with the Consortium.

- I developed many rewarding friendships with teachers and administrators at all of my school sites. While I'm aware

> that my primary association with them was on a professional basis, I also regarded many of them as personal friends, people whom I could enjoy in other settings too.

When asked what about her role was positively stressful, the linking agent unhesitatingly replied, "leaving my house at 6:00 a.m. to get to a 7:20 meeting at Mitchell." Though, if pressed, she probably would find, in her good-natured way, something beneficial even about that.

THE MIDWEST LINKING AGENT

CHARACTERIZATION OF THE LINKER

The linking agent role in the Midwest was filled by two different people during the course of the three-year Consortium project. The first held the position for two years and then was replaced for the final year when he became director of the linking agency. Both people will be described in these pages as the linking agent; the first will be designated linking agent A and the second, linking agent B.

Lounging casually in his chair, and with a small smile playing across his face, linking agent A might well be described as relaxed, yet there is also a current of alertness, of readiness to spring into action. He has been depicted by school people at one site as a support-giver:

> Last meeting we panicked, feeling that things weren't getting done. He said that was OK, sort of reassuring, like a mother.

And as a leader:

> He didn't let us flounder. Said, "I think we need to do this, this, and this." He kept us going, gave us ideas. The teachers look at him as an expert.*

But not so much the "expert" that he took over the group, as one teacher noted:

> His way of working is good. His nature is to draw people's feelings out. He moves away from the frivolous. Yet he doesn't impose.**

Linking agent A is not new to working with school people to bring about change. He began work as a facilitator at his agency in 1974, and since then has worked with a number of district- and building-level people on needs assessments, problem solving, installing new programs, and resource linkage. The difference between what he did then and what he did as a Consortium linker was one of freedom, he says:

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* Both quotations reported by Miles in Fullan, Michael; Matthew B. Miles; and Gib Taylor, OD in Schools: The State of the Art, Vol. IV: Case Studies. Final Report to NIE. New York: Center for Policy Research and Toronto: Ontario Institute for Studies in Education, 1978, p. 89.

**Ibid., p. 86.

> In the Consortium project I was tied down to a rigid, step-by-step model; whereas before, whatever I determined would work best was the way I proceeded. And then, with the Consortium, I had to document so much more than I'd had to previously.

He prefers operating independently, as a "lone arranger," and seems to try to brush off constraints that might interfere with his sense of autonomy. It's not surprising, and not entirely irrelevant, to note that his garage contains, among other things, such "independence means" as a small airplane (he's a licensed pilot), a motorcycle, a sports car, and a pickup truck. His checkered background also points to his propensity to try different things, to be free, if you will, of a label after his name. He worked in television for six years, he has done graduate work in history, and he has taught in the public schools for 16 years (eight in junior high and eight in senior high schools). He spent a year as a social studies coordinator at an urban school, and has been elected to city and state educational association offices. He and the first agency director developed an innovative program and disseminated it to 32 schools in several states; it is still going strong.

He has come by his small group process skills and knowledge of organization development through "learning and doing on the job. I was doing some of these things before I knew there was something called OD." Linking agent A considers his ability to work with people one of the major assets that he has brought to linkage work. He feels that he has a basic understanding of people and how they operate:

> I didn't see any problem that was new, that I hadn't seen before in my work with teachers through the state education association. Teachers are about the same anywhere in the state: they're basically not competitive, they're not risk takers. My job was to deal with people in a non-threatening way and at the same time be able to motivate them to do things they hadn't done before. I think I was able to some degree to do that.

Communication skills play an important role in linkage work, and he felt that he had the ability to relate well to a wide variety of people:

> I would go in [to a school] and determine in which way the administrator was functioning--participatory, directive, paternalistic. That would have a lot to do with how I approached working with that school. I had to be able to speak the language, to be understood in their terms. Otherwise, we wouldn't have gone anywhere. I think I did a reasonably good job on that.

And:

> It was important to be able to talk to a farmer on the Board of Education and not frighten him off. I played the good old boy system. One board member invited me to help him with wheat harvesting. A

> superintendent invited me to go coyote hunting several times. He doesn't ask <u>everybody</u> to go coyote hunting out there. You have to recognize these invitations as the compliments they are and thank people for them.

He understands the importance of knowing the context in which he will be operating, and seeks out political, economic, and religious background information through informal methods like going to a local restaurant two or three days in a row:

> People start sitting down and having coffee and talking with you. You get a feel for what's going on, what's important, how they view the schools.

He made a practice of spending time in the teachers' lounge and arriving an hour or two before a meeting so that he had the opportunity to chat with people. At the same time that he was gathering information about them and their setting, he was laying the groundwork for working there:

> The Board of Education knew who I was. They knew what the Consortium was. They knew about the agency. So did other people in the district and in the school I was working with.

> People in this part of the country are a little suspicious of outsiders. The fact that I listened a lot--I wasn't a textbook salesman --and had spent 16 years as a teacher myself gave me a lot of credibility. I built on that, like when I helped at one site by subbing for a regular teacher once.

Working with his sites meant getting the group participants to a point where they felt comfortable in making their own decisions. He cites a constant problem as that of polarization between letting people make their own decisions and imposing decisions on them. Many districts impose decisions, and people, teachers in particular, are accustomed to that. Linking agent A strives to improve his skill in setting the stage for people to make their own decisions:

> I want to guide people in certain directions so they look at a set of alternatives, rather than the alternative of doing nothing. Some of the people at my sites would have been very secure if I told them which program was the one for them. They probably would have taken it, and it might have worked. But it wouldn't have been theirs. They wouldn't have owned it.

When asked to characterize his style of operating with sites by placing himself on a continuum with proactive (10) on one side and reactive (1) on the other, he promptly responded with 7, and qualified it by saying that proactive to him did not mean directive: "I don't want to direct anybody, or tell them what to do. I want to point them toward choices." Early in the project, this linker noted in one of his contact reports that he was uncomfortable

with having to take a directive role at one of his sites and that he preferred the collective task-setting style of two of his other groups. One observer, after a meeting at this particular site, noted:

> In some ways it would be more accurate to characterize his role as discussion group leader rather than chairperson. If no one had anything to say, he would just go on to the next topic.

Even though the linker grew a bit more "demanding" of participation at this site, the observer's judgment may not be entirely fair, given the linking agent's first concern of creating a comfort zone in which people who were unaccustomed to sharing their feelings and problems publicly could do so without threat. Taking a slow, easy, unpressured approach is often a good strategy for encouraging people to open up. About this site, linking agent A said:

> It was really difficult for them to admit that they had a problem. That was a big step in itself. After that, they could focus their energy, and meetings got more productive.

Linking agent A did not feel that his lack of expertise in reading theory was a particular problem, though he readily admitted to needing to know more about it than he did. He felt that it was the job of the site people to examine the various reading programs and to make their own choice. His contribution, as he told one principal, was to "help groups make high-quality decisions; to manage conflict; and to aid them in assessing, clarifying and stating their needs." If reading expertise were needed, he reasoned, he would bring in consultants to work on specific areas.

There is an air of confidence and seriousness of purpose, of political savvy and determination, about this linking agent that is wrapped in what one observer has referred to as his "personal smoothness," in his colorful speech, and in his unhurriedness. He is a scouter of new territories and a builder of bases, which he tags as frequently as is needed.

Linking agent B enjoys a close, collegial relationship with linking agent A, now agency director and accordingly, her supervisor. She is a no-nonsense, efficient person, given to frankness:

> I'm not interested in reading theory and instruction, and I haven't felt a loss without it. If I would have been required to have intensive training in it, I probably wouldn't have done it.

She characterizes herself as easygoing, pointing out that she's accustomed to working under "hyper" conditions, so it takes a lot to shake her. With a master's in Latin and Greek, she has taught in a variety of fields, including Latin, English, drama, and arts and crafts, from the kindergarten to college levels. Linking agent B has also worked for several years at the agency in different

tasks. She has been involved with a vocational education program, focused mostly on career education issues, has worked extensively with the ERIC system, and served as a state facilitator for the National Diffusion Network in the northwest part of the state.

She feels that her work as a facilitator was good preparation for working in the Consortium project, where the same things were done, but more intensively: clarifying needs, looking at options, matching programs with needs, and giving implementation assistance. Linking agent B sought training in human relations, needs assessment, and small group process skills when she felt a need for them, but states that she learned most of her skills from linking agent A:

> He's participated in quite a few different training workshops and has gathered a lot of skills in working with groups. When I worked the northwest, I scheduled a lot of workshops with him. I learned an awful lot from him.

For the past year or so, she hadn't felt the need to seek new training experiences, but now she does:

> I think it's useful for a linker to know organization development theory. I probably wouldn't operate off the seat of my pants so much if I had more of that theory base. Some formal training in dealing with organizations as a whole would be valuable for me.
>
> Knowledge of organizations and how they function is a lot more important than content matter, like reading, say, for a linker to have. There are a lot more reading consultants than there are organizational consultants.

Coming as she has in the last year of the Consortium, her involvement with school sites has been on the lean side. She relies on informal means of making contact with the teachers or principals, by arriving at the building in time to have lunch with teachers and taking that opportunity to check on their progress and find out what problems they had, or dropping in to watch a class or two and then have a chat with the principal. Asked to characterize her working style on a proactive-reactive continuum, she said that it really depended upon the situation, but that her preference was always to work through things as a group. She doesn't like to take a directive stance unless she has to. At one site, she felt she had to:

> The principal didn't want the program trainer to come back for a follow-up session. I thought it was essential; the teachers needed help, and the principal was wearing himself out doing all of the clerical tasks himself. I pushed hard for bringing the trainer in again, and he resisted almost until the day she arrived. I think he was afraid that she'd find that they were doing something wrong.
>
> With him I've been very directive on some things, and on others I just let them ride. It depends on how important they are to the program.

Unless some situation becomes a crisis, she doesn't like to assume a directive role because "it's hard to go back; you lose the effectiveness of working as a group."

She has been described by participants at another site in terms of the communication link she has provided:

> She is respected by all concerned as being knowledgeable, friendly, cognizant of their needs and respective of their concerns. She listens to the teachers' complaints and conveys them to the principal. The teachers believe that she will have more success in getting the principal to heed the complaints than they would if they tried to deal with him directly.*

Linking agent B works on an even keel, expecting people to do what they say they'll do, helping them when she can, saying no when she must. Her style of linking strikes one as almost a literal interpretation of the term: she is a strong broker of resources, much more inclined to put people in touch with whom or what they need, in contrast to a roll-up-the-sleeves, jump-in-and-do-it helper.

THE LINKER'S AGENCY

The agency in which the Midwest linking agent works is part of the educational dissemination and diffusion system for the state. It is loosely connected with the state department of education; but its staff are technically employees of the local school district, which serves as its fiscal agent, though not its governing body. The agency has two branches: (1) information and materials, utilizing national computerized information systems, the state documents file, consultant file, and promising practices file; and (2) technical services, consisting of a group of educational specialists who aid school people in school improvement. It is the second branch, the linkage component, in which the Midwest linking agent is based.

Described by the director as a "client-driven and client-oriented service agency," the linkage component lists as its technical services available to schools assistance in such areas as:

- Assessment of needs
- Information searches

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* As reported in the epilogue to the case study prepared by Stone Wiske for the Consortium Report Series. The epilogue covered events of the third year of the project, and is recommended to the reader seeking more detailed site information.

- Design and evaluation of programs
- Adopting new approaches
- Educational change processes
- Conducting workshops and inservice training

With a staff of five facilitators,* including the linking agent, plus the director, the agency serves the whole state, no easy task given its considerable size and the extraordinary distances between school districts. The facilitators divide into geographic areas, each serving those districts in a particular part of the state.

The agency opened its doors in 1974 with a director, a facilitator and a bookkeeper/secretary. It has grown in size and in reputation since then. Whereas they had mounted an extensive awareness campaign to inform school people of their existence, now they rely almost strictly on referrals from satisfied users. The agency sends out a newsletter regularly to about 200 school people, in and out of the state. The director relished one comment from a state education official reported to him by the superintendent of a school district with which he was working, which blamed his agency for being so effective at aiding small districts in offering up-to-date, good programs to students (via the National Diffusion Network, Title IV-C, and the Consortium) that these small districts were able to survive; they didn't have to consolidate. The director called this a "back door compliment."

Located in the back of what was once a school but now serves as a community education center, the agency is adjacent to what had been the industrial arts room, now unused and strangely silent. The office is partitioned into little cubicles for every staff member on each side of its rectangular shape, creating a central corridor that is lined with seemingly endless cartons of information and materials. A huge, marked-up map of the state dominates one end of the office. The clatter of typewriters and conversation can be jangling when everyone's hard at work, and a good tape recorder can pick up discussions two cubicles away. But no one seems to mind, and probably they glean a little-known fact or two from professional eavesdropping now and then.

The agency appears to be a small, close-knit organization that functions informally, with facilitators performing some management

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* The director takes issue with the terms "linker" and "linking agent," considering them appropriate for information purveyors but not for a staff that can offer professional technical services to schools and districts, and actually "facilitate" school improvement.

activities that "sit well" with the director. Spending a morning at one of their regular weekly staff meetings, attended by the director, five facilitators, and the administrative assistant/ secretary, showed them to operate in an informal, yet brisk fashion. The chairperson, a role that rotates from week to week, had prepared an agenda on newsprint, which the others then amended at the start of the meeting. With a watch in one hand and a magic marker in the other, the chairperson led the staff through the agenda, calling for discussion, information, resolution, and a decision to move on to the next item. She kept everyone involved and on target without being overbearing. At the end of two hours, the staff had completed the agenda to their satisfaction and had made decisions that they needed to guide their ongoing work. This is very important, since one facilitator only comes in from the field for these meetings, and the others come and go so frequently in their travels to their parts of the state that anything less than a brisk meeting could tie them up on issues requiring group input.

THE LINKER'S PERCEPTION OF HIS/HER ROLE

Linking agent A indicated that the major goals that drove his linkage work with the Consortium sites were: (1) to help them achieve a positive educational change, (2) to aid their efforts to correct a deficiency by hooking them to a suitable program, and (3) to make site people aware of the problem-solving process so that they could apply it to other areas when needed. This last goal was not shared by Consortium Central as appropriate or necessary for linking agents to attempt to achieve, about which linking agent A said: "We went round and round on that one, and I guess I lost,* but I never gave it up completely."

The vehicle for achieving these goals was to follow the 16 steps of the problem-solving process, referred to as the milestones (see Appendix for list of milestones), though this felt confining to him:

> Having to follow each step of the process, in order, is based on the assumption that the people you're working with are starting from zero, that they need to go through everything. For some districts, that's true and it's a valuable experience. But for a district that's already into a problem-solving mode, it's redundant to impose that model on them and make them start at point 1 again.

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* The Consortium Project Director, upon reading this, stated that he didn't feel linking agent A had "lost." His interpretation, instead, was to point to this discussion as an instance that showed the Consortium project's flexibility in supporting linking agent diversity.

Through the course of following the process, linking agent A stated that his role underwent a change from initiator/intervener to helper/observer at about the time of program selection. He described his activities as calling for him to:

- Create an atmosphere for open discussion and decision making
- Help in analyzing data on the need for change
- Provide process assistance to the group
- Supply material and human resources
- Point out steps of problem-solving process used by the group

As initiator/intervener, he says:

> I had to get everything set up and moving. I told the principal what types of people should be in the multi-constituent group. I informed the Board of Education of what we were doing. I insisted that data inform the group's decisions and got them to look at real data, rather than just guess about what was going on. It was my job to keep the group on task, following the milestones, and I had to push for closure as well as make sure they were meeting frequently enough.

He usually ran the meetings and principals agreed to that because, in his view, "it took the heat off them. If it bombed, the 'outsider' could be blamed; if it was a big success, the school would be credited." In the beginning, he would set the agendas himself; later on, he initiated setting the agenda with the group at the end of one meeting for the next, so that they'd get experience in doing it and come prepared the next time. He found this to be an effective device to stir enthusiasm:

> They weren't used to meaningful agendas, ones they'd had input to and an interest in. They were more accustomed to meeting for the sake of meeting. Once they started making up their own agendas, they also took responsibility for deciding who would do what.

It also proved to be a good means for involving people who would eventually take over his tasks:

> My purpose in getting them involved was to further their development of ownership of the project, with the intent that somewhere down the line they'd begin to take over the role I'd been playing so I could back out. They're the ones who ultimately have to implement the program and live with it.

He curtailed his efforts at building a capacity for future problem solving to making the group aware of the process they were going through:

> I told them that we were looking at reading because that was what we were mandated to do in the Consortium, but that I wanted them to realize that the process could be applied in lots of different areas to solve curriculum or other problems. Often I reminded them that the process could be used just as easily with math, or science, whatever.

He pointed out that even though one of his sites dropped out of the Consortium about seven months into it, they later used the whole process, step by step, to select their next science program. On their own.

The switch from initiator/intervener to helper/observer meant a move from problem exploring and problem solving to the more logistical concerns of procuring materials, trainers, supplies, and making the necessary arrangements. This, for linking agent A, marks the actual, if gradual, beginning of transition from engagement to disengagement, and it appears to be a less interesting period for him. He had less to say about it and reported less in his contact reports than was the case with the earlier, more "engaging" period. This sense is heightened, perhaps, when one remembers that there is somewhat of a shrinking role for the linker to play: he is, after all, not a real participant and instead functions as an aide to those who are involved in implementing. Further, the fact that linking agent A had no in-depth knowledge of reading made the school people's activities in training and implementing even more remote to him. Nonetheless, he considered it his function to see that site people had all that they needed to effect a good implementation and he carried it out.

Linking agent B characterized her role during the third year of the project as a maintenance one, stating that she saw her function as:

- Assisting with final implementation concerns
- Offering encouragement and support to implementers
- Preparing site people for her disengagement at the end of the year

She described the "winding down" phase:

> I think it's really the easiest part of working with schools because they're virtually on their own. There usually aren't any real crises, especially during the last three or four months. If there are, you're all in trouble.

Since the sites would no longer have outside financial and brokering assistance after the Consortium project ended, linking agent B worked at "making sure they could start next September without any big snags, so that they'd be ready and able to go without any help from us." She noted that the high level of involvement can't

continue after the project left, and that it was important to move toward that gradually, though for her its timing was disadvantageous:

> Because I joined the Consortium at the beginning of the "wind down" year, I didn't have the opportunity to get to know the staff very well, although I interact with some of them. It's been an advantage in one sense: disengaging isn't too hard to do because I'm not that highly involved with them. But I might have been more helpful to them, especially early in the year, if I hadn't had to spend some time just getting to know them.

Most of linking agent B's time has been devoted to working with the principal to ensure a smooth transition of responsibilities, an easy September start-up, and plans for follow-up training. She said that any more involvement with the schools would have amounted to "meddling." At one site, she functioned as a "conscience" to get people started with implementation, which had been delayed by their inability to obtain the program materials:

> They were nervous about starting up. The superintendent met with the staff a couple of times about it, and I was a constant reminder to them that they weren't doing it. Finally, they got geared up, and since then they've maintained speed.

For linking agent B, winding down was extremely important with the Consortium sites:

> I've never worked with schools where the level of interaction was this heavy. It was very important to me to know that they would be able to do it on their own, so I always interacted with that in mind.

One Consortium Central observer, noting the "hands off" policy of both Midwest linking agents, felt that they didn't have "a Consortium experience," that their participation in it was perhaps a means for doing what they'd do anyway.* "They probably viewed the Consortium as an intrusion." Indeed, linking agent A, referring to the constraints under which he felt he operated, spoke of the "regimen the Consortium imposed, a series of hoops that linking agents had to jump through with the district, whether they were needed or not." He also noted, not unwillingly, that "being forced into somebody else's model" taught him a lot, mostly about the importance of using multi-constituent groups for decision making and, certainly, about documentation. He added that sometimes the locus of responsibility got muddied in the face of meeting documentation

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* Linking agent A, after reading this statement, objected, feeling that there was a basic disagreement between the agency and Consortium Central on work style and focus, which might have caused this "disparaging" view of the Midwest linkers. He suggested that the disagreement also may have been heightened by his supervisor in the first two years of the project, since he "enjoyed baiting the folks at Consortium Central."

requirements of the Consortium. Was the linking agent responsible to the client? To the agency? To the Consortium Central staff?

What seems most evident from the linkage styles of both Midwest linking agents is their focus on front-end brokering (group problem identification and ownership), paying minimal attention to later implementation issues. The geographical dispersion of districts in the state no doubt sets the condition for this style of linking: it reduces the possibility of intensity; linking agents can't just drop in to see how things are going when the site is four hours away. The agency operates a model calling for clients to "own the problem and own the solution," an approach requiring linkers to do a lot of front-end work to achieve this ownership state with clients and then to move away from it all to serve in a troubleshooting role. Seemingly, the outside agent moves in for a short time to work intensively with clients and becomes something of an "insider," but then moves back out again, allowing school people to put on their own production. This approach, not unlike that used by National Diffusion Network state facilitators, accounts for the relatively lean involvement of the Midwest linkers with the implementation stage, and establishes the context for the way in which they perceived and carried out their roles as Consortium linking agents. It is an approach which may have the effect of hastening the independence of site people and, accordingly, making disengagement less of an event for both the sites and the linking agents. Alternatively, it is an approach which may leave site participants feeling abandoned or adrift.

THE LINKING AGENT'S USE OF RESOURCES

Of the resources available to Consortium participants, the Midwest linking agents seemed to make the most use of the following ones, which are divided into two categories: Consortium Central, and the agency.

USE OF THE CONSORTIUM SUPPORT SYSTEM. Of the various resources, six were noted as the most helpful:

1. The network of Consortium participants -- This group refers, not to linkers, but rather to agency directors and Consortium Central staffers when functioning as "people linkers." Thus, linking agent A considered the Consortium "a hell of a good connection to have when you need some information or a consultant," and referred to the ease he had in getting help by calling one of the agency directors or a Consortium Central person. Linking agent A did not consider himself part of a network of linkers, but rather part of the Consortium project, and he seemed to identify with and share more with the agency directors since he knew several of them before his involvement with the Consortium.

This was true also of linking agent B, who remarked on how uncomfortable she felt upon assuming Consortium linkage duties and suddenly being in a subordinate position to agency directors with whom she'd interacted before on a peer basis.

Meeting with the directors at Consortium meetings provided a good opportunity to exchange information on what their various agencies were doing. Linking agent A said, "it gave me a better handle on what's going on around the country; that's important because we're always looking for better ways to do things."

2. Consortium meetings -- Linking agent A recalled a half-day session with a reading consultant as very helpful in providing him with some framework for understanding some of the issues site people would face in selecting reading programs. Other parts of the training that he noted as very good were: (a) a self-inventory that was then exchanged with another linker who would attempt to rate its accuracy; (b) a tinker toy exercise in which "planners" would look at a structure and then explain how it is to be put together by "implementers," who must then construct it without having seen it; (c) Gene Hall's presentation on the levels of usage of an innovation; (d) the role plays, which unfortunately were discontinued because other linkers didn't want to participate in them, presumably because no trust had been developed at that point to have permitted people to take risks of self-revelation. He added that he liked learning new strategies for working with groups and called them "bullets for his gun."

   He absolutely hated the sharing sessions of the Consortium meetings, believing that they were just gripe opportunities without any inherent value.

   Linking agent B joined the Consortium too late to participate in the training sessions. She called the sharing sessions "boring," but added that that may have been because she hadn't been through the "total linker experience."

3. Consortium Central personnel -- Linking agent A cited the important role that the Resource/Data Management Coordinator had played in providing information on the resource pool:

> We set up conference calls a few times with her and the site people by using a little amplifier phone. The voice from the East answered all of their questions, and it was kind of a kick to the folks to see that we really had that connection back there.
>
> The Consortium Project Director came out and worked with me as a colleague--doing the interviews and the Chalk Talk game--it proved that there were people back there and that they were concerned enough to come out and work with them.

> The Linker Support Specialist had good listening skills and served as a sounding board. We exchanged a lot of ideas, and he did a nice job in working with me on the state-wide conference last year.

Linking agent B underscores the Linker Support Specialist's helpfulness, pointing out that he gave her a lot of suggestions, helped by offering constructive criticisms on her documentation work, and even bailed her out a few times on report requirements.

4. The Tool Kit -- Linking agent A called the Tool Kit "one of the neatest things I've seen," stating that he's used it many times, has lent out some of its contents to a couple of Consortium sites, and has used it as the core of the agency's training program when two new facilitators came on board last summer.

   Linking agent B has also used articles from the Tool Kit, but mostly in working with other sites prior to her joining the Consortium.

5. Other Consortium products -- Linking agent B said that she found the individual teacher interviewing technique and the problem-solving process (the milestones) extremely useful in working with a school prior to her joining the Consortium, saying that they helped her to help them think through the issues and real problems.

6. A budget -- Linking agent A cited the fact that he had a budget and the discretion to use it as he saw fit proved to be a real support. He was very impressed with the high trust level that such "freedom" entailed.

USE OF AGENCY RESOURCES. Two types of resources were named by the Midwest linking agents:

1. The agency supervisor -- Linking agent A felt that for the most part his supervisor was supportive, but that he didn't want to spend much time at it. He was particularly helpful, though, in brainstorming strategies for working with sites and in alleviating some of the isolation that linking agent A felt:

   > You have to realize that as a Consortium linking agent, you were almost a totally independent entity. Getting a new look at what I was doing through someone else's eyes really helped.

   Because their desks faced each other, he and his supervisor were "in constant contact," but they did not schedule regular meetings to discuss Consortium issues.

Linking agent B described the close interaction she has with her supervisor on a daily basis, noting that they've worked together for four years. Her discussions with him on Consortium matters were informal and conducted on an as-needed basis.

2. Other agency people -- Seeking help from other staff is done on an ad hoc, popping-in-to-ask-a-question basis. Linking agent A noted that when he needed help or coverage at a site, he would turn to a staff member much more readily than to someone outside; for example, linking agent B filled in occasionally if he could not get to a particular site.

   Linking agent B recalled that she had little interaction with other Consortium linkers, whom she didn't know very well, so she tended to turn to someone at the agency, who was known to her, if she needed assistance or suggestions.

   While the agency has weekly staff meetings and decision-making sessions, Consortium issues tended not to be discussed, presumably because the funds were already earmarked: the agency viewed the Consortium as belonging to the prime contractor, not to themselves.

●●● Observations on the linkers' use of resources: The overall impression of the Midwest use of available resources is that it was spare. There seemed to be little active attempt to locate and use help.* This might have more to do with a disinclination to report or to recall such use: a little digging, for example, netted two unreported instances of resource utilization (travel to a reading conference and consultants brought in to train agency staff in small group process skills). Or, perhaps the impression is accurate, and symbolizes an attitude of confidence and comfort with the role and functions of the linking agent, exhibiting no strong need for finding and using resources to aid in the effort. The relatively thin use of resources might also stem from a cultural set of "doing for oneself," relying on oneself to figure out what needs to be done, a notion that seems to fit well with what has been noted of the linking agents' approach to linkage work.

   If anything, linking agent A provided resources to other linkers much more than he ever sought them out for his own use. For example, he sent copies of resource files and surveys, related issues that had surfaced in his site meetings and gave some advice on how to deal with them, provided information on, among other things, conference calls utilizing amplifiers, and so on. He seems to have served as a "linker to linkers."

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* Linking agent A considered this statement unfair, stating that their active attempts to find and match resources are not always successful, that they have to check them out so as "not to get burned again. But when we find good resources, we use them to death."

THE MIDWEST LINKING AGENT IN ACTION

During the first two years of the project, but particularly the first of these two, linking agent A spent the majority of his time on Consortium work (he was budgeted at 80 percent on it). He recalls December as an impossible time to schedule meetings at the schools because of special holiday activities, and at one site he had to forego site visits for two months in the spring of the first year while contract negotiations were in progress. Otherwise, it's a little difficult to get an accurate fix on time allotted to particular projects, mostly because of the tremendous travel time required to get from one site to another, which should be included as work time, and which also suggests the need to touch more than one base per visit:

> I worked a lot of hours a day. The travel alone meant four hours out and four back, or with one site I had, six out and six back. That kind of travel will really eat you up. I always tried to combine other business in the district with those Consortium trips.

This same practice held true for linking agent B in the third year of the project, although when new staff joined the agency and the state was divided into geographic areas with a staff person assigned to each, one of the other facilitators covered the site that was six hours away, since it fell into his region. The Consortium linking agent, however, maintained prime responsibility for it and completed all reports on it.

Linking agent A visited each of the four Consortium sites about twice a month during the first year, and somewhat less in the second. These visits consisted of multi-constituent group meetings, appointments with principals and other administrators in the district, and informal chats with teachers, plus the training and follow-up training sessions. The third year also showed about two visits per month (though, as noted above, one site was visited by another staff member), but often a telephone call to school people served in the stead of a visit, if all appeared to be going smoothly at the site. Of this third year, linking agent B said:

> I really felt that the level of involvement Consortium Central expected was too high for the final year. If it hadn't been for all of the reports and data they wanted, it wouldn't have required 80 percent of my time. The paperwork filled up the rest of my time.

The third-year visits were briefer and more informal than were those of the first two years, in accordance with the philosophy of encouraging a relatively brisk takeover of responsibility for the innovation by the site people themselves.

Five major phases of the Consortium linkage work (entry, problem identification, program selection, training and implementation, and disengagement) provide the framework for looking more closely

at the Midwest linking activities. Two of the four sites provide the settings: Flaco Grey, an elementary school in a small farming town, and Hartfield, a tiny rural elementary school.* Short descriptions of each site follow.**

THE SITES. Located in a small farming town of about 21,000 people in the western part of the state, Flaco Grey seemed to stand almost still in the midst of much growth and development. Irrigation technology is transforming the area into a small, bustling urban setting with an expanded economy and population. While the majority of people living in the area are white farmers, the influx of Mexican-American agricultural workers has swelled the Hispanic community to nearly 30 percent, and caused housing developments and the building of new schools to accommodate their numbers.

Flaco Grey, one of 12 elementary schools, is considered by the central district to be on the lower end of the scale for innovativeness, with a principal who operates in what might be called the old Jimmy Carter mode. Wiske reports that "he attempts to manage even the minute details of administering his building so that he is continually overwhelmed with minutiae" and presumably, this constricts his time for taking a strong leadership role. The school has nearly 400 students, with a somewhat disproportionate 40 percent Mexican-Americans, who are served by 16 teachers, most of whom have taught in the district less than four years. The assistant superintendent recruits nationally when school positions become available in an effort to keep a flow of new ideas coming into the district. Flaco Grey is perceived by the community as being the school with low academic achievers, though Wiske points out that the reading achievement scores of its students were "only slightly below the community averages." Wilson suggests that the principal felt under pressure from the central administration to adopt an innovative program.

Hartfield is located in a tiny rural community of fewer than 300 people in the western part of the state. They are a very insular group of white farmers, whose families have lived there for generations and whose children stay on to rear theirs too. Outsiders are viewed somewhat skeptically until they prove themselves worthwhile. Wiske notes that the school is the hub of the community and that "cheering sports teams in a major form of entertainment in Hartfield."

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* The names of both schools are pseudonyms.

**Descriptive data on the sites are taken from Alfred Wilson's case studies and Stone Wiske's epilogues, both prepared for the Consortium Report Series. They are recommended for more detailed information on the sites.

The elementary school has an enrollment of about 80 students in kindergarten to eighth grade, served by eight teachers in eight classrooms. Wilson reports that there is one kindergarten teacher, two teachers for grades one to three, two for grades four to six, and three for the seventh and eighth grades. It would appear that some vertical grouping of students is done. The principal is also the district superintendent and has been characterized as having a good mix of innovative ideas and knowledge of the town's norms and values. He has proceeded carefully with instituting educational change and is well respected in Hartfield. Wiske points to the school's structure as reflective of the community's assumptions:

> Both men and women tend to see men as the source of power and decision-making authority....With all male administrators and mostly female teachers the elementary school has operated as a hierarchical institution where authority flows in one direction.

The school allows children to be children, not working them too hard or competitively, but providing them with a "quality education" while letting them enjoy life. Wiske indicates that the norm is to be a part of the group, rather than to spurt ahead according to one's potential.

SITE SELECTION. Linking agent A played a key role in selecting sites for the Consortium. He recalls that at the time that the Consortium proposal was being written, he and the agency director contacted some districts and asked if they'd be interested in participating. These contacts were made in February 1976 and letters of commitment from the superintendents were included with the agency's part of the proposal. The bases for invitation to participate were several; in general, they included a good track record in previous work with the agency, which also encompassed the notion of readiness to adopt an innovative program, at least on the district office level. Second, a cross section of community size, and fourth, a geographical distribution within the state were sought. Fifth, to the extent possible, a varied population of students among sites was thought desirable. While the agency director would have preferred to work with 12 sites, he and linking agent A agreed to invite five or six districts to participate, "expecting that one or two would drop out, which is what happened," according to the linker.

In the case of Flaco Grey, the agency had worked quite successfully in other schools in the district and had found it to be an easy, innovative, and supportive district. The assistant superintendent urged the principal to get involved in this project. The fact that the district is located in a city that was growing rapidly made it an interesting site. Linking agent A thought that the city might have grown by a third in the past three years and indicated that it was one of the few real expanding areas in the state:

> It's a community that's changing from rural to urban. It's interesting to see the kinds of paper trails they're starting to develop and the sort of bureaucracy that's coming in. It's almost inevitable. But, they're trying to build a bureaucracy that's responsive.

The district is located in the southwest corner of the state, and, as stated earlier, it perceived that Flaco Grey students were low achievers. Probably more important a need, as far as the assistant superintendent was concerned, was that of initiating the school and its occupants into the world of educational change. This school, with its 40 percent Mexican-American student population, also provided the student variety desired by the linking agency.

Hartfield shows a marked contrast to Flaco Grey. While the district had worked successfully with the agency and indicated a readiness for change and eagerness to enter into another working relationship, it also was a tiny, static farming community. People are not moving in, building shopping centers and McDonald's. They live on farms that are 5-10 thousand acres, which makes for a different community from a third site consisting of farms of about 160 acres for raising livestock and growing corn. Hartfield is located in the western part of the state, but somewhat more centrally than Flaco Grey. Other sites, by the way, were located in the other corners of the state. The all-white Hartfield student population, colored by a single Mexican-American face, varied from the other sites which were not so monochromatic. The agency had assisted the Hartfield district in setting up a modified Delphi needs assessment in 1975 and helped to pay for a consultant to work with them on it. The needs assessment revealed two areas requiring attention: math and reading. The agency worked with the district in adopting a new math program, which was regarded as a highly successful intervention by both. The Consortium project provided an excellent opportunity to tackle reading, a need which later proved to be a cloak for the underlying real one.

It appears that both schools' acceptance of the invitation to participate in the Consortium project originated at the central administration level, although the Flaco Grey principal might conceivably have rejected the offer had he been utterly opposed to it. In both districts, school staff were not invited to join in the decision.*

●●● Observations on the linker role during site selection: The linking agent played a major, initiating role, equal to that of the agency director with whom he shared the responsibility for this phase. Both he and the agency director had contacts

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* Linking agent A adds that school staff had the opportunity to decline involvement at the joining-up conference or later, after school started up.

all around the state and knew many of the districts exceedingly well, so it made sense to pool their information and share the task. They did this by making contact with central office administrators in each district.

ENTRY. Linking agent A chose a snappy kick-off for the Consortium project: he conducted a "joining-up conference," similar in purpose to the one which Consortium Central had held for the linking agents earlier, as a means for orienting the six invited sites to the project. By start-up, two sites had dropped out. The two-day meeting was held in mid-August 1976 in a centrally located city. Included were representatives from the central administration, building administration, and teaching staff of each district, as well as a school board member and the president of the local teachers association. With the aid of linking agent B, the linker planned and conducted such group activities and topics as:

- What is this agency about?
- Triads on "my special concerns about change"
- District task force concerns regarding the Consortium
- Purpose of this NIE project
- Requirements of participation
- Description of the process, with particular focus on the multi-constituent group and the needs assessment/ problem identification stage
- Time frames for decisions and a calendar of events

The linking agent felt that the conference was one of the most successful events the agency had ever done:

> It was a very diverse group of people. Many of their questions were the same, so they got to see some of their similarities and their differences. It was exciting for them to come together, and they were curious to find out what was happening around the state. From my point of view, I was able to handle all of their preliminary questions at one time. I didn't have to run around for weeks and weeks getting everything together. We walked out of the conference with everyone knowing when I would be coming out, what I was going to do, when I would do interviews and talk with the school board. Everything. And besides, it was really cost-effective, considering how many trips it would have taken if I'd done it individually with each site.

Not being new to Flaco Grey's district, linking agent A already knew that principals "got points for doing something innovative and making some positive changes." He noted that as an outsider

with a school improvement program to offer, he had a strong calling card and people sought him out:

> We probably have 10 or 11 things going on at different schools in that district. If you don't get around to see them all, they get upset. They're not getting enough attention. There was some jealousy when the Consortium project went to Flaco Grey; they didn't think the principal deserved it.

Linking agent A met with the principal on 9 September 1976, knowing him only by reputation and from their brief encounter at the joining-up conference the previous month. He characterized him:

> He's friendly, but conservative and wary. He seems to want to work with the Consortium but sees it as a risk. He also seems bothered by my participation in the multi-constituent group.

All day on 20-21 September, linking agent A conducted the individual teacher interviews. He questioned the whole Flaco Grey staff, and acquainted them with the Consortium by handing out a three-page description and allotting three or four minutes for reading. For most teachers this experience was their first encounter with the Consortium, and the linker felt that the reception was favorable and that he got better connected with the staff. He discussed some of the emerging data with the principal and provided suggestions of parents who could be invited to join the multi-constituent group. On the evening of 20 September, he made a 20-minute presentation on the Consortium project to the Board of Education at the invitation of the assistant superintendent, which he thought "went over very well."

The linking agent met with the multi-constituent group for the first time on 6 October, and was pleased with the "reasonably good cross section" the principal had pulled together of representatives from the staff, the board, parents, and the teachers association. The group covered all of the organizational issues outlined by the linker and moved on to initial planning for a student survey regarding their home reading habits, availability of books and magazines, and presence or absence of cable TV for educational programs. Of the meeting the linker said:

> This group put in some considerable effort thinking in advance about what was needed for choosing a good reading program. It looks as though they'll work very hard and probably move a little more rapidly than other sites. They're well organized and anxious to get things going.

Entry into Hartfield was smooth, in spite of the linking agent's having to overcome the "big city guy" image that the residents had of him initially. He noted that he always wore boots when he went to Hartfield, so that he'd fit in better, and believes that any suspicions of him as an outsider were washed away simply by the fact of his being there regularly:

> They found out I wasn't an ogre. I was somebody they could talk to, and I intervened occasionally for some of the folks when they needed something from the superintendent.

In addition, the linker had established a strong connection with the superintendent earlier by encouraging and helping him to apply for Title I funding, which was then requested for grades 7-12. The Consortium project became a way to take care of the elementary grades and at the same time satisfy the teachers who felt neglected when the math program was installed the year before. So, Title I funding and the Consortium began at roughly the same time; achieving an easy bridge between the two at the 6-7 grade levels was believed important. The composition of the multi-constituent group reflected this concern: half of its membership represented Title I.

The chairperson of the Title I committee, who was also the high school principal, assumed that he would chair the Consortium group as well. Seeing the potential problems with that, linking agent A suggested that he himself chair the group, at least through the program selection stage, at which point he would play a lower-key role. The superintendent agreed, but not before a couple of meetings had been "frittered away" by the Title I bloc, according to the linker:

> [The high school principal's] mouth ran like a machine gun most of the time. The Title I reading teacher was just as bad. The two of them made an impossible combination, because they virtually blocked anything from happening.

The solution, cagily worked out between the linking agent and the superintendent, was to make certain that either the high school principal or the Title I teacher was always absent for a meeting, called away for basketball practice or whatever. It was decided that one alone could be dealt with, but in tandem, they stonewalled everything.

Multi-constituent group meetings were often held in the evenings because, according to the linker, "it gave them something to do. The exposure and broadening was good for them." He found, though, that while the group members were more accepting of his presence, they still had a difficult time with expressing and addressing their needs; it was simply not something which they were accustomed to doing. By the second meeting on 20 October, the superintendent and the high school principal were pressing the linker to be directive, to tell the group what kind of reading program they needed. He resisted firmly, pointing out that his role was that of helper and resource provider, and thus began the long search for the real problem faced by the Hartfield teachers.

●●● Observations on the linker role during entry: At Flaco Grey, the only potential blemish threatening to mar a promising start was the mild resistance of the principal, who was under

the gun from central administration to accept the project. Using his good interpersonal skills, linking agent A was able to clear the way for collaboration: he initiated several talks with the principal and had lunch with him so as to begin developing a friendly, cooperative relationship. He learned the principal's "language" and adapted his approach so that they could communicate on the "same wave length."

At Hartfield, having passed the initial probation period for outsiders, the linker functioned sometimes as an intervener between teachers and the superintendent/elementary principal. This became a rather stable part of his role at this site since he was a means for the teachers to get those little things they needed for their classrooms without having to go themselves to ask, something which they were reluctant to do. The linking agent also negotiated a nice compromise in the situation with the two Title I members of the multi-constituent group by tempering the superintendent's initial desire to exclude them both entirely, which would inevitably have led to district squabbling. His pointed refusal to tell the multi-constituent group which reading program he thought they should select underscores his definition of his role as a process helper and resource provider, not a decision maker for others.

PROBLEM IDENTIFICATION. This area is likely to be neglected by busy school people eager to get on with the task of selecting and implementing a new program. The Flaco Grey group gave brisk attention to this phase: they gathered data from achievement test scores, anecdotal accounts from teachers, a small sampling of community attitudes, and student surveys. Parents in the group took an active role in determining the questions and in collecting the data. The linker notes that:

> Parents were extremely interested up through the program selection stage. After that, it became a school activity for teachers, and they stopped coming to meetings. It happened at all four sites. Flaco Grey was especially anxious to have parents involved because they felt more secure if parents really knew what was going on and had input into what the kids were doing.

The group looked at the data that they had collected at their 18 October meeting. Probably the most surprising information to emerge was that reading scores in most grades were above the 50th percentile; those below were mostly the Hispanic students. On 9 November the linking agent and the Consortium Project Director, who was on a circuit ride, conducted the Chalk Talk game, a simulation for analyzing curricula in relation to needs. The linker noted the timeliness of the visit and the tremendous help the Project Director provided with the simulation, all of which gave rise to positive feelings among group members too. The emergent set of needs included:

- Management and record-keeping system for student progress
- Techniques for student motivation
- More enrichment materials
- Vocabulary and comprehension work

The linking agent worked with the group to create a list of selection criteria based on their identified needs, the results of which were: (1) a reading program to raise students' affective and cognitive skill levels, (2) a consistent reading instruction management system, (3) growth in reading instruction competencies, (4) high-quality teacher training, and (5) improved management of transient students. The group felt ready to start examining possible programs.

The Hartfield group pushed for leaping ahead to explore available programs before identifying their needs. They rejected participation in such process activities as the Chalk Talk simulation, usually on such grounds as having to leave early for an athletic event, and resisted discussion of their perceptions of reading problems. Test data presented in mid-November 1976 were even more surprising than those at Flaco Grey: only four to six elementary students in all were reading below grade level; all others were at or above grade level. The linker didn't quite trust the data and felt that the group was unwilling to admit that problems existed. Clearly vexed, he decided to "play their game and spring on them the abstracts of the 40 R&D programs." Discarding those programs that didn't fit with their notion of an enrichment program, the group quickly selected 11 for intensive review and informed the linking agent that they'd call him in a week to tell him which program materials he should bring for their examination at the next meeting.

Returning from a Consortium training event in Boston, linking agent A decided to be "hardnosed." He negotiated the split of the Title I duo, which freed him to get the group back on course. He initiated a group writing task that would produce a problem statement and elicited their promises to bring their final versions to the next meeting. At the January 1977 meeting, the linker showed an agency-produced slide/tape on adoption and barriers to change, and followed it with a discussion. The group worked on its problem statement, which linking agent A noted as "more or less completed," and characterized it as:

> Their major problem is one of isolation. There is no collegial contact, no new ideas, and additionally, there is a feeling of inferiority, poor self-image. Their goals are to obtain enrichment reading materials for students and to participate in staff development in relation to those new materials.

●●● Observations on the linker role during problem identification: Both sites were characterized by the linking agent as more or less "champing at their bits," so in some respects the linker had to keep them reined in, which is particular evident at Hartfield. At Flaco Grey he functioned as a process enabler, guiding the group through the appropriate problem identification steps. But Hartfield was a constant tug of war as he battled to focus the group on the problem identification phase and to extract their real perceptions. He turned from a compromise approach to one of firm leadership when it became clear to him that the group needed a strong helping hand in this stage of the process. How the problem statement emerged, and what part the linking agent actually played in its formulation, is not entirely clear. The linker states:

> It took a long time for them to be able to express their sense of isolation. We had so many long, drawn-out meetings, at night, before they could finally bring themselves to say it, both to themselves and to me.

The linking agent role is a collection of many roles, and the importance of flexibility in shifting from one to another, bringing out different skills as needed, is undisputed. It may have been the linker's flexibility, or perhaps his perseverance, that finally paid off at Hartfield.

PROGRAM SELECTION. Linking agent A worked diligently to keep his sites active in the narrowing process and well supplied with the contacts and resources they required for arriving at a suitable choice. At Flaco Grey he led the multi-constituent group through a process of eliminating programs due to district size, cost, and program intent factors. He pulled together information about the remaining programs and coordinated a system for dividing them among teams of two for closer study and report outs to the whole group. He aided the group in formulating and listing questions for transmittal to the Resource/Data Management Coordinator at Consortium Central, and arranged a conference call between her and group members with the help of a telephone amplifier system.

At the point when the group had narrowed its choices to three, the linker became concerned that members were not communicating with other teachers in the building, and he feared an elitist decision that would get foisted on the others. "If that had happened," he said, "the program would have died an unnatural death. So, to prevent that, I called for open meetings." He saw that agendas were made public in the school five days before meetings and that it was clear that everybody was welcome. For insurance, he created a mechanism whereby the new visitors could participate:

> There was an empty chair at the end of the table. The other staff could listen, and if they had something to say, they could sit in that chair to signal that they wanted to be recognized.

The group expanded, until by the time of program selection, all 16 members of the faculty were present.

Of these three programs being considered, one was already implemented in the school district, so linking agent A arranged for staff from two other schools to give presentations to the group, for which almost all of the faculty turned out. The multi-constituent group was ready to choose this program, but the linking agent "virtually insisted" that they see the other two in action. He set up site visits for group members, and when it was realized that the teacher substitute budget was nearly depleted, he offered himself and linking agent B as substitutes for teachers making the visits.

Action was interrupted for a time when teachers turned their attention to contract negotiations, but was quickly resumed with site visit reports on all three programs. Using a simulation, the linker gave each participant a dollar and asked them to distribute it across each program being considered. This "spend-a-buck" game resulted in overwhelming support for one of the programs, not, by the way, the one already in the district. The group decided to adopt three elements of the program: comprehension for the upper grades, and skill building and word attack for the lower ones. The linking agent suggested that the program already in the district may not have been chosen for that very reason:

> Flaco Grey wanted to make a mark for themselves by doing something new and different, rather than picking up something already being used in the district.

He felt that the choice was on the whole a good one, though probably not cost effective, since they had a valuable resource right in the district for the other program. It seemed to meet their selection criteria point for point, though he claimed not to have a deep sense of that because of his limited knowledge of reading.

At Hartfield linking agent A obtained descriptive materials on the three programs the group had selected for a closer look. He arranged for them to use a credit card so they could call program developers directly to ask specific questions regarding components, which they did. The linker noted the initiative that the group showed in contacting developers, and he states that they even called nearby users, which developers had identified, to get their views on the adoptions. By February 1977 the group had narrowed to two programs, and the linker made arrangements for a site visit to each, one of which was implemented at a (relatively) nearby district, and the other in an adjoining state.

When the teachers returned from their site visits, they clearly favored the out-of-state program, but they fully expected to be told they'd have to select the other, closer one. By this time, the linking agent noted, the teachers had become excited and

highly involved with the exploration process, so much so that for the first time they were talking about the pros and cons of this and that program with other teachers in the lounge and were sharing their ideas much more openly in the multi-constituent group. He says:

> They couldn't quite believe that they were actually going to be involved in making the decision. They thought they'd have to take the closer (cheaper) program and bury their enthusiasm for the other one. They looked at me with disbelieving eyes when I insisted they could pick the one they thought was best for them.

The group chose their favored program, which had "a ton of materials and a good management system allowing for considerably individualization," according to the linker, at the end of March 1977. Because of all of the already-prepared materials, he felt they had met at least one of their criteria--the supply of enrichment materials--and hoped that their contact with developers and users and the upcoming training would help them overcome their sense of isolation as well.

●●● Observations on the linker role during program selection: This phase marks the beginning of what linking agent A has referred to as his "go-fer" role. The term seems more applicable to his work at Flaco Grey than at Hartfield, where the group took an active role itself in seeking information from and contact with developers and users of the programs they were considering. No doubt their initiative was somewhat self-serving and rewarding because it broadened their network of communication with the outside world: they didn't have to go through the linker and possibly lose an exposure or two to other people. Whether or not this effect was intentional on the part of the linker when he gave them the telephone credit card is not clear.* In a very real way, though, the linking agent functioned in a support role, by encouraging the group to study the pool of programs and reassuring them over and over of their right to make their own decision on which one to adopt.

At Flaco Grey his leadership skill is nicely illuminated by his reading of the elitism that was developing around the multi-constituent group. The fact that he saw the growing mistrust of uninvolved faculty members and their fear of having to live with a decision made by the group, and then acted upon the situation in an effective way illustrates the importance of understanding school climate and the political implications of operating in one way or another. Had he not acted, political repercussions of the exclusion could have stunted the program's implementation.

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* Reading this, linking agent A claimed that he did it intentionally with that effect in mind.

TRAINING AND IMPLEMENTATION. Linking agent A set up training sessions for each site, but unfortunately, they both had to be scheduled for the same days, 18-19 August 1977, so he was unable to be present at one event. He chose to go to Hartfield, and asked linking agent B to handle the Flaco Grey site. Apparently, the trainer knew the program well but was not too skilled at motivating teachers. She said several times during the two-day period that it would take five years to get the program really in place, which may have demoralized the staff, because by mid-October implementation was judged to be at a low level and the principal said that the program was more work than they'd anticipated. Linking agent A arranged for another facilitator at his agency to pull file duplicates from the demonstration site resource file and send them to Flaco Grey as a starter kit. With the principal, he set a target date of the beginning of the second semester for full implementation of one of the three components, leaving the other two for later attention. And he insisted on a meeting of the multi-constituent group in the first week of December as a progress check. Concerned that the program would end up on the shelf, the linker said:

> It looks to me like the assistant superintendent and the principal now wish they'd gone with the other program, since the resources and materials are all available in the district, including excellent training personnel.
>
> I can't help but think that the trainer deserves much of the blame for this situation. She didn't give much of a process orientation to the teachers and now they're feeling overloaded and confused.

To hasten the development of the resource file, linking agent A suggested contacting the developer and having the materials printed at the district's vocational education school for the cost of paper and ink.

Program implementation improved as more materials became available for the resource file. Complaints and confusion decreased. During the summer, linking agent B took over as linking agent A moved into his new role as agency director. She advised the principal to have a refresher training workshop, but he declined, saying that the program was in good shape and only one new teacher had joined the staff, but she'd been working on the program with other teachers and didn't feel the need for further training. However, by the end of September 1978 the teachers had not yet started using the new program for the year, and linking agent B speculated that they were not comfortable with it, particularly after the summer break. They began implementing again in October, only because the linker insisted, and by November, with one component fully implemented and another being "dabbled" with, she scheduled a refresher training session over the objections of the principal for the other two components.

Follow-up training consisted of a full day of observation, one-on-one work with the teachers during their free periods, and an after-school meeting with the entire staff. At this meeting a list of nine concerns about the implementation was generated by teachers, to which the trainer responded with suggested strategies for solution. Linking agent B noted in a follow-up visit she made to the site that little had been done to address those concerns, so she urged the principal to make them the focus of the next faculty meeting. Linking agent B chose not to call any more multi-constituent group meetings, and began working instead on an individual basis with teachers and with the principal. When something called for group attention, she would ask the principal to put it on the faculty meeting agenda. At her suggestion, teachers gradually began to try using multiple groups in their classes, which eliminated the problem of mismatching students and skill levels being worked on. With the principal she focused on management strategies and resource linkage within the district.

The training session at Hartfield proved to be a great success. Linking agent A, present for both days, called the program developer "a seasoned trainer" and was pleased to note that the teachers were fired up and ready to go. However, by 31 August 1977, only the program developer materials had arrived; the rest of the extensive array of guides, tapes, worksheets, and so on, which had been produced by a commercial publisher, were still missing. The developer/trainer recommended holding off implementation until they arrived. In early November linking agent A delivered the bulk of the materials (11 cases) to Hartfield, with a promise from the publisher that the rest would be coming some time after the first of the year. He also contacted the developer/trainer, who offered to come out to give refresher training for expenses only. Linking agents A and B met with the superintendent and the high school principal on 15 February 1978 to survey what materials were still missing and to determine if implementation could start. They decided to contact the developer/trainer and leave the decision to him. Even so, the high school principal blocked implementation until late spring when the superintendent interceded and told the teachers to start the new program. They experimented only briefly with the materials, given the lateness in the school year and their growing need for retraining.

Linking agent B arranged a refresher workshop to be conducted by one of the demonstration site people on 24 August 1978. Though the training session went well, the linking agent found on her visits to Hartfield in September that "the materials were in the closet, the teachers dabbled with some of them, but they weren't implementing the program." She met with the superintendent to discuss ways of getting them to start; they decided that he would first encourage the teachers to begin, and if that failed, he'd "resort to verbal force." By October the teachers had begun implementation, and the school librarian had managed to locate more of the missing materials. The linker visited regularly to talk with the teachers and the superintendent about the program

and occasionally to observe a class in session. She offered to try to replace some bad tapes and to check with book salespeople on availability of some out-of-print materials. She also scheduled another training session with the developer/trainer for work with the teachers to reinforce their "old" skills and build new ones. Also, the demonstration site trainer who provided the refresher training in August 1978, and who had assisted several times since, was scheduled to come back to do another session later on.

In March 1978 linking agents A and B conducted a state-wide conference for the four sites that focused on client capacity building. Though it was scheduled to coincide with the end of the first year of implementation, this didn't quite work out for all sites. Hartfield, for example, didn't start implementation of their program until the fall of 1978. The conference was viewed by most participants as extremely worthwhile because it dealt with real, live issues. In addition to reviewing the process that each school had gone through, participants identified obstacles they might encounter in the next year and brainstormed ways of overcoming them. They also dealt with the reality of getting in a rut, losing enthusiasm and burning out after a year of implementation, and looked at ways to work through that time. They had the opportunity to share their successes (and failures) and to learn from each other's experiences.

●●● Observations on linker role during training and implementation: Linker activity changes noticeably during this phase at both sites. Both linking agents functioned more in the roles of resource arrangers and information linkers than anything else, and as planned, their centrality to the process began to decline. At Flaco Grey, the linker turned a good part of her attention to working with the principal in an effort to improve his managerial capabilities. His preoccupation with minutiae, such as running off copies of materials for the resource files and scheduling students into various classes, not only ate up his time and energy but made him less of a resource to the teachers implementing the new program. For teachers at Flaco Grey, linking agent B seemed to serve a "friendly watchdog" function: Wiske reports that they thought her visits kept them on their toes in using the program.

Other than resource arranger and information linker, linking agent B served as an interceder at Hartfield. The teachers seemed to see the superintendent as less interested in their building-level concerns and they valued the linking agent as a "message carrier" between them and the superintendent. Wiske quotes the superintendent/elementary principal as saying of the linker, "she creates a communication line that the teachers wouldn't use themselves and I might not hear them if they did."

> For the Midwest linking agents, the training and implementation phase actually marks the beginning of their withdrawal from the school sites, one effect of which is to create a situation where implementation problems don't come to their attention until they become crises. They don't engage in minor troubleshooting, or greasing of machinery, until it breaks down,* as in the case of Flaco Grey, when early implementation was judged low, and the teachers were demoralized. It's also evident at Hartfield, where implementation was delayed, after materials were on hand, until October of the school year. In both instances the linking agent responded to a "work stoppage" situation by jumping in and "joggling" people, shaking them into action. No evaluation planning seems to have been carried out with either site.

DISENGAGEMENT. The Midwest linking agents began shifting their work emphasis after the point at which sites made their program selections in accordance with their notion of going in, doing the job, and getting out. Not one to drag out his active presence at a site, linking agent A stated:

> Your success in linkage work depends upon the clients' success. If they're doing something they've never done before and they recognize that they've made progress, that's your win. Your ego fulfillment has to come from that, not from making yourself needed so much that their hands are tied.

Linking agent B added:

> It's nice to know that you're highly involved and helping school people with new processes or information, but they're going to have to stand on their own feet and the sooner you ease them into it, the better... for them.

Linking agent A pointed out that whereas he made a point of reporting progress to the Board of Education at least twice, often three times a year, when the program was selected, he shifted the responsibility to a school person. Thus, this person announced the program selected and got board sanction for it, and in the process became identified with it and built ownership of it.

After training, the multi-constituent groups stopped functioning as such. Once in a while they might be reconvened,but it was more likely for members to transform the group into a committee with a new focus, e.g., a reading committee looking at student problems, or to disband altogether. Linking agent B began shifting the responsibility for ordering materials and contacting developers

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* Linking agent B objected to the language of this statement, calling it "unfair, heavy, and judgmental."

to school people. Consistent with that was the schools' gradual assumption of the costs of the materials. She also noted that sites were beginning to make their own plans for follow-up training. In addition, she told the sites that they'd have to start thinking about doing their own public relations on the programs, and was pleased to report that the Flaco Grey principal had written a nice little item for the local newspaper.

Two events marked the beginning and end of the disengagement phase. First, the transition from linking agent A to linking agent B occurred between the second and the third years of the Consortium project, when most sites were about to embark on their second year of implementation. Except in the case of Hartfield, which was just starting to implement and needed a troubleshooter, the other sites were more or less rolling along in a routinized fashion. They didn't need much help. Second, the linking agents held a state-wide conference for the four sites as a rounding off of the Consortium project. They invited some other school people too so that they could compare the differences between using the Consortium problem-solving process and not using it to install a new program. The school people discussed the change process and their views of it. Both linkers were surprised to hear the Flaco Grey principal outline the process his school had been through and his perception of how valuable it had been. In fact, most of the Consortium site people easily described each step of the process, which to the linking agents meant that they had been aware of it, learned it, and had the potential to apply it some time in the future. Of the conference, linking agent B said:

> We wanted this get-together to be a celebration, our way of saying thanks for their hard work during the past three years. We had a working agenda, focusing on the change program and the process they went through, but it wasn't meant to be a heavy duty. We held the meeting in a big city so people could go out and enjoy themselves too.

Linking agent B feels no sadness at concluding the Consortium project, and says if anyone should it would be linking agent A, who didn't have the opportunity to wind down his involvement with the sites.* She feels that both sites are in good shape and won't have any trouble continuing their programs. Next year, she expects to stop in at each school to see how they're doing, as she still does with schools she worked with a couple of years ago:

> They don't get a lot of exposure to outsiders, and those that do come in are either state department officials monitoring them or angry parents yelling at them. Nobody stops by to say hello, I like the way you've fixed up your building this year, how are things going. I stop to chat, give them a break from routine. Sometimes I help with a problem.

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* Linking agent B objected to the inclusion of this statement, stating that it was irrelevant.

●●● Observations on the linker role during disengagement: This stage marks the shift to emphasis on the linker's outsiderness from a relatively "inside" position. It is a moving away. Withdrawal from the sites does not appear to have left any long-term scars on the school people involved with the Midwest linkers. In fact, many of the examples of the means by which they shifted responsibilities to the sites are actually illustrative of what happens when institutionalization of a program takes place: getting board sanction, ordering and paying for materials, planning follow-up training to "fix" the teachers' skills, doing public relations, building in a budget line for the program. Linking agent B said that at one site a new teacher referred to the program as simply "the reading program," not the new program. It hadn't been pinpointed by other staff as new or different; it was another part of the whole curriculum. It had lost its sense of newness, and had become routine. The linkers' gradual disengagement from sites during the year or year and a half following program selection may well have hastened this process of institutionalization. Program renewal, however, was neglected.

The "friendly ear" role that linking agent B describes is worthy of comment also. It appears to be important for helping to keep the programs alive, the teachers interested and feeling appreciated, and the agency-school relations cordial.

EFFECTS OF THE LINKING AGENT'S ROLE

When asked to report the estimated effects of their work on the sites, on the agency, and on themselves, the linking agents listed these various impacts:

EFFECTS ON SITES. In addition to having new programs in place and the new training experiences that accompanied them, other effects included:

- Familiarity with a problem-solving process that's probably more important than the programs they adopted. They can apply the process to other situations.
- One site converted the multi-constituent group into a reading committee as a permanent mechanism for addressing reading problems. Before, reading had been only one item on the agenda of a faculty meeting.
- Improvement in the reading scores of some of the students who had been at the lowest levels.

- Connection to the outside world of people and ideas. They have names and phone numbers and materials they can use.

- Teacher input into an important decision. Being in the multi-constituent group forced them to be involved and to participate in a decision, something they weren't accustomed to doing and probably thought they weren't capable of doing.

EFFECTS ON THE AGENCY. There were several:

- We strengthened our ties with people in the districts. Every time we'd make a Consortium visit to a school, we'd visit with others in the district as well.

- We increased our knowledge and understanding of how other service agencies function, what approaches they take, through our Consortium meetings. We had time to talk at some length.

- We've improved our documentation and record-keeping systems by organizing them differently. But we'll never do as much documentation as we did in the Consortium!

- We're experimenting with new methods of staff selection, based on what we've learned from other Consortium agencies and on linking agent experience in the Consortium.

- One of our sites initiated a contact with our agency to get help with a physical education program. That probably wouldn't have happened if we hadn't already been at that school and been positively viewed by school people.

- The Consortium experience probably has helped us define and verbalize what we do as an agency better than we did before our involvement, not only to clients but to new staff members. We can orient them better to our approach to linkage.

- We used the Consortium process in building an implementation plan for a new women's educational equity project, which just got funded.

- We're exploring possibilities of future networking with some of the other Consortium agencies. It looks like a rich territory to mine.

- We've given and gotten help from the other agencies, things like computer searches, advice on budget development, and so on, which has been great.

EFFECTS ON THE LINKING AGENTS. Several professional effects were mentioned:

- I learned the importance of using multi-constituent groups in school decision making.
- I got some background knowledge about reading.
- I had the opportunity to practice some of my skills at school sites because I had the time for it.
- I developed some good connections with agency directors and learned a lot from those exchanges. We maintain our information network for consultants in a lot of different areas, like time management, evaluation, futures planning.
- I think my ideas about linkage and working with school people have sharpened. I'm more critical of facilitators who only rack up large numbers of adoptions and don't provide real technical assistance to schools.

When asked (separately) what was the most stressful aspect of their work as Consortium linkers, they each replied instantly and candidly, "reports, reports, more reports." The Midwest linking agents share more than a style of linkage; they also share a strong distaste for what they regard as unnecessary paperwork.

THE NORTHEAST LINKING AGENT

CHARACTERIZATION OF THE LINKER

The Northeast linking agent seems to typify focused energy, enthusiasm bound up with clearheaded thinking. She's optimistic and involved in her work. Said one observer:

> Her commitment to the work and to the people was particularly evident when she took a couple of teachers out for a drink to find out what was upsetting them, what they really wanted, and how they could get it. Despite her annoyance (at times) and frustration, she hung in there for three hours, working relentlessly to get to the root of the problem and to come up with a solution. Afterwards, she promised to talk with the superintendent, and she did!

One gets a sense of her straightforwardness, partly from the way she looks directly at people, and partly from the problem-solving orientation that she brings to bear upon her work. These qualities may reflect the type of person she is as much as her particular background and training.

Working as a community organizer in the late 1960's, the Northeast linking agent became involved in adult education and training, an interest which expanded from on-the-job exploration to a master's degree in adult education. During that time, she also grew proficient in organization development skills, which she has applied to independent consulting. Joining her agency in the summer of 1975, she served in two capacities, both of which proved to be excellent training for her subsequent role as a Consortium linking agent. First, she worked as a field agent for the National Diffusion Network State Facilitator project, a position which called for her to aid teachers and administrators in identifying and clarifying needs, selecting an appropriate program, and obtaining necessary training and technical assistance for implementation. The second responsibility entailed her coordinating, as well as participating in, a project aimed at helping groups of local school administrators define their educational planning and management needs, select a suitable program, and create a plan for using newly acquired skills in their own districts.

Unlike the other two linking agents involved in the Consortium case studies, the Northeast linker has not taught in the public schools, a fact which she was quick to point out to the school people with whom she was working, and one which she came to regard as a plus:

> All of my work has been with adults and small groups. I stressed that I was a teacher of adults, not of children. Because I wasn't coming in as an expert teacher of kids, I didn't see myself as helping teachers in that way, and they felt comfortable knowing that I wasn't coming in to judge their teaching.

Furthermore:

> I wasn't defensive about not having a public school background. My skills were in a different area, and besides, my first year at the agency provided me with the opportunity to go out and work with a lot of different schools. By the time I joined the Consortium, I knew a lot about schools and how they worked.

Pointing to the focus of the Consortium project on working with a multi-constituent group, the linking agent noted that one of the major attributes she brought to the position was her extensive experience with group processes. She mentioned in particular such activities as group problem solving, team building, decision making, and conflict management--all tasks with which she had provided help to groups in a variety of settings. Another strength noted by an observer is her range of interpersonal skills: communicating, active listening, supporting and reinforcing, and counseling. A third strong point involves her knowledge of organizational issues:

> I know how to analyze organizations, who the key people are and how to work with them. I'm good at understanding people's roles and seeing situations from different points of view within an organization. I can help people negotiate by interpreting these different perspectives to them.

Knowing the importance of recognizing, understanding, and dealing with the concerns of school people who might object to or feel threatened by the installation of a new program, the Northeast linking agent carefully developed and nurtured good relationships with people operating at all levels within the school district. Said one principal of another school, "she's aware of the whole district, and she's very supportive, always there to help out."

The one area in which she felt she needed some help was reading theory, since she didn't have the slightest acquaintance with it:

> Malcolm Knowles says that a process consultant doesn't have to know anything about the content, but I disagree. During that first year, when people were arguing about different notions of reading, I had to know enough about it to be able to intervene, even if it was just to know when to say I didn't understand or to make sure everybody in the group knew what was going on.

Although the linker doesn't claim to be a reading expert now, she has learned a lot about the area through Consortium training and her own efforts, which provided her with the proper grounding.

Asked to characterize her style of operating with sites by placing herself on a continuum with proactive/directive (10) on one side and reactive/nondirective (1) on the other, the linking agent promptly pointed to the directive end, maybe between 8 and 9, and said:

> I'm a process consultant in that I help people to talk to each other, to make decisions, but I'm not passive at all. I confront them on what they're doing, I keep them on tract. I try to move the process along and stop conversations that go on too long. I control that a lot. In that way, I'm very directive.

A good example of her directiveness in group discussion comes from one site where the group was attempting to define the problem. The linker had just listed their concerns on newsprint, and then the discussion began moving toward solutions:

> I stopped them in the middle and said, "this is the kind of discussion that we will be having later on, but what you are really discussing are solutions. You have both identified the same problem and you're talking about different solutions. They're both viable alternatives, but we haven't gotten to the point of agreeing on the problem. So I want to stop that discussion." It was helpful to say that in reaction to a specific instance; they understood my point and nodded vigorously in agreement.

In her approach she tries to be clear and well organized: she lays things out in advance--her objectives, the means by which she plans to accomplish them--and at meetings she facilitates the group's progress by using newsprint to record happenings for all to see, by summarizing decisions and progress at the end, and by outlining "next steps" with the group.

Her documentation not only records site events and their nuances, but also discloses her thoughts and feelings about those events. She wrote of a meeting with one group to negotiate her role with them for the coming year:

> I think, upon reflection, that I was nervous about having them discuss my role and possibly evaluate my usefulness. Thus I actually encouraged them to keep talking about other issues.

Another time she noted her irritation with a principal and her work to resolve the problem:

> I tried hard, and I think successfully, to keep any punitive note out of my voice, to be understanding and problem solving in my approach (arggh!! such self-control!). He was more frank and comfortable with me than he's been. We also established a few important ground rules.

Her documentation displays site activities in bold relief, making events stand out for readers unfamiliar with the schools and

people, and provides the means by which others could understand her interventions and give feedback. She noted, with some pride mixed with wonder:

> [The agency director] read all of my contact reports. I couldn't believe how much he knew. He'd stop me in the hall and say, "I really thought what you did with the _____ situation was good." It was some ordinary little thing I'd done, but he had noticed and cared enough to tell me he liked it, which made me feel good.

The overall impression of the Northeast linking agent is of an experienced, self-reliant person who took responsibility for her work at her sites and for getting her own needs met. She is a self-learner and a seeker of information when she feels she needs it. This was evident when she reached the implementation and evaluation stages, areas in which she wanted more background information, and read the literature and sought advice from experts. It was especially clear early in the project when she objected to not having a supervisor to represent her at the Consortium supervisor meetings, and succeeded in getting one:

> I wanted a supervisor to talk to and to connect me with the agency too. I went to the agency director and made a case for having a supervisor, and listed my three choices of who I thought would be good in that role.

This type of proactiveness characterizes the linking agent, and is reflected in several different settings as well, as can be seen in the following pages.

THE LINKER'S AGENCY

The agency in which the Northeast linking agent works is a non-profit educational service organization that provides training and technical assistance to public and non-public schools, intermediate service agencies, state education agencies, colleges and universities, and funded educational projects. The agency provides services in four main areas:

- Field services -- staff development and consultation in program and curriculum planning, staff selection and evaluation, program selection and adoption, management and organization development, vocational and career education, and special education

- Communication/product development services -- development and distribution of programs, products, curriculum materials, as well as agency newsletters, brochures and products

- Information/resource services -- information retrieval by manual and computer means, resource library of books, journals, curriculum materials, training products, audio-visual materials, and documents

- Evaluation services -- design, implementation, and analysis of program evaluations

A newsletter announcing workshops, conferences, and other events is distributed regularly to public and private schools, colleges and universities, and state and federal agencies.

Created in 1969 to promote growth and improvement in schools and other educational organizations and to provide training and technical assistance, the agency offers on-site help in assessing needs, using available resources, and building management and problem-solving capabilities. While historically a service organization, the agency has recently become involved in coordinating a multi-agency research effort to study school improvement programs in ten states. It has the State Facilitator project, and also provides technical assistance to model programs for the handicapped and to Title I demonstration projects.

This agency also houses the coordinating component for the Consortium project (Consortium Central) and provides staff, facilities, and services to support the effort. The linking agent's supervisor stated that a linker "couldn't be in a better place because the agency's major priority has been dissemination and technical assistance. There are lots of people here who can offer expert help." He added:

> This agency was developed initially to provide on-site assistance to school people. We've been working at it for ten years now, here in the Northeast and across the country as well. There are a lot of resources, human and material, to draw upon around here. People have some pretty strong ideas here about how you do things and how you don't. But maybe that's almost as much a disadvantage as a strength, if they can't be open to new ideas about the best way to give assistance.

He mentioned another "drawback" to being only one of many linking agents or technical assisters in an agency:

> You're less likely to get recognition for developing a new area of expertise for the agency. You might think you've grown a lot in building your skills, but others might not even notice. Of course, when there are 30 other linkers running around, you also won't be the only one who can provide help on linking issues, so less of your time will be siphoned off for that.

The agency occupies a well-preserved, handsome Victorian house on the outskirts of a small and very pleasant town. Having moved from its cramped quarters two years ago, the agency has continued

to swell its numbers, and once again is sub-dividing office space to accommodate more people. On hot summer days, people practically pop out of the building to seek stretching space on the rolling lawn. The house teems with activity on its three floors, and even the basement level has been converted to work space. Photocopy and word processing equipment, assorted cabinets, chairs, files, tiers of in-baskets, typewriters, bulletin boards, and a plant named Arthur all exist as the relatively stationary objects around which nearly 55 people travel from their offices to others' desks, to the kitchen, to the copier, to the typist station, and so on. The ambience is cheery and good-natured. Sunlight streams through the leaded glass windows and brushes a golden glow over the oak woodwork. There is much joking and bustling, and people pitching in during crunches of activity to help each other. Productivity levels and spirits seem high, though there is some evidence of growing unfamiliarity with various projects and what people are doing in them. To offset this potential disconnectedness, staff put out a weekly in-house news sheet so that they can keep abreast of each other's comings and goings, beginnings and endings of projects.

THE LINKER'S PERCEPTION OF HER ROLE

The Northeast linking agent regarded the major goals guiding her work at Consortium sites as: (1) diffusing R&D outcomes to local schools, (2) facilitating the change process, and (3) creating an awareness of a systematic problem-solving process among school staff. About the aims she stated in a question-answer session following her initial presentation to the faculty at one site:

> We hope that in the process people will become skilled enough and aware of resources enough to know how they can work on their other problem areas.

Welcoming the more intensive, longer-term relationships with a few schools (as contrasted with her experience on the State Facilitator project), she perceived her role in two ways. First, she considered herself to be "manager of the change process," functioning in five major role categories:*

> Process enabler -- organizing and guiding a multi-constituent group in communicating ideas, determining needs, making decisions, managing conflicts, and solving problems

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* These categories were synthesized by the researcher upon hearing the linker discuss her roles, and were based on Crandall's categories in Linking Processes in Educational Improvement, pp. 222-228, and those used by Abt's linker survey instrument.

Resource arranger -- planning and setting up training events and state-wide conferences, making certain that materials were available, providing financial help, and arranging for appropriate consultants

Information linker -- providing needed information on processes, materials, and other resources, as well as connecting group members to other information givers

Coordinator -- smoothing the way for planning and implementation activities, arranging for substitute teachers, opening communication between central administration and school, and timing group events to fit with district and school concerns

Observer/recorder -- preparing group statements, writing minutes of meetings for school records, keeping accurate accounts of site events and perceptions (own) of them

Second, she saw herself as a "consultant to managers," meaning principals, focusing on organizational consulting, guiding the process, and helping principals to be more effective. She viewed herself as being engaged in organizational interventions, and because the project had a building focus, felt that she got maximum leverage from working most directly with principals. She tended not to work so much with curriculum coordinators, instead viewing them as the content experts in the group: "It was really useful to have them talk." The linking agent considers this a "classic OD approach, a top-down model starting with the principal, but including participative aspects of working with teachers in decision making." She notes also that since she sees the school as the unit with which she is working, this militates against close attention to superintendents and the whole district, though they cannot be ignored. Indeed, she performed a frequent and important buffering function between central office personnel and principals, between principals and teachers, and between district and school building staff.

Within the multi-constituent groups, the Northeast linking agent played a strong focusing and initiating role. She chaired the groups at both sites, led the meetings actively, pushed them to do some things to get more information, and pressed them to make decisions. She stated that she "almost always stood back and merely facilitated group decision making," though at one site, she remarked:

> I thought they were never going to decide, so I said, "OK, this is what I think you should do." They said, "oh no, we don't want to do that." At least it helped them decide what they didn't want.

Although she never participated in the actual decision, she did her best to push the group along to make it. For example, at another site which had narrowed its choices to two programs but

couldn't reach a decision, she developed a comparison sheet of the pros and cons of both programs, which the group then used as a basis for discussion.

She felt herself to be in control of the multi-constituent groups, inasmuch as she led the meetings, and described it as "appropriate, and helpful for them to have somebody outside the district play that role." In fact, the superintendent at one district told her:

> I think you are trusted here and perceived as objective by all parties. I have gotten that feeling from my conversations with [the Title I director] and with the others. They believe that you work in the best interests of everybody and that you are an objective outsider.

Interestingly, this outsider was perceived as an insider by the principal at another site late into the third year of the Consortium project. They were discussing his idea to bring in an outside process consultant to lead a staff meeting on concerns over reassignment, early retirement, accompanying rumors, and so on. When the linking agent offered to lead the meeting, the principal responded:

> You're not really an outsider anymore. You're seen as part of the group, and even though you might do a good job and I might be wrong, it doesn't <u>feel</u> like having a neutral outsider.

After this discussion, the linker noted, "an interesting observation and another reason to disengage!" Later, she speculated that she still functioned as a third party consultant in that group, and that the principal's statement was based on his confusing a friendly professional relationship with a friendship.

At the outset of the Consortium project, the Northeast linker designed her role, based on the guidelines contained in the proposal and, later, on the milestones as they were formulated, and operated quite independently. She recalls that her mission during the first year was clear, and she knew exactly what had to be done. This first-year clarity, however, began to dissolve once the multi-constituent group had passed the program selection point and became involved in implementation issues:

> We passed through the decision-making process, and I had to figure out my new role during implementation. That's a problem for process consultants involved in resource utilization--when people start implementing, they need a lot of specific help. I couldn't possibly become an expert in all those programs, so I had to redefine what I was doing. It was a real crisis for awhile.

Her role shifted from that of a process consultant to a troubleshooter as implementation got under way:

> I started visiting classrooms, just as a way to keep myself visible in the school, but then I found that teachers liked it. They felt supported. I discovered that it was also a good way to gather information on how things were going, what troubles existed. I probably couldn't have found out otherwise, because when you ask a direct question, people often say, "things are fine."

With people's true perceptions of the problems, the linking agent was able to figure out what needed to be done, whom to call together, what consultants might be helpful, how to involve the principal without compromising teachers' positions. She says she "hung around a lot," talking to a lot of people, watching what was going on. But, she adds:

> It would have been easier on me if I didn't have to fill up 100 percent of my time. I kept thinking, "I should be doing more than I'm doing," but I couldn't figure out what.

Believing that her role definition was critical, both to her and to the schools, she decided to involve the site people in the task by negotiating with them what functions she would perform that year and the next. As a result of these negotiations, she continued her troubleshooting function and "signed on" for such work as providing assistance with evaluation, including development of student and teacher surveys; aiding the principal in structuring his new plan for establishing task forces on organizational issues like building use and community relations; meeting monthly with the multi-constituent groups; conducting change agent training;* and encouraging diffusion of the new program within and beyond the district. Negotiating her role with all of her sites proved to be a successful strategy: it not only resolved her questions, but it also fit well with her process orientation and consultant stance.

Her perception of the linking agent role can be seen as based primarily on an organization development consulting model, though it became a bit uncertain for a while at the point when the school people turned the corner and began implementation of the selected program. How much influence the agency and Consortium Central exerted on her interpretation of the second and third year linker role is unclear. At one point she noted that the second year was less defined than was the first, which she attributed to the nature of the work: "It still calls for a certain amount of ground breaking." She sought help from several agency people (the agency director, her supervisor, other linkers), and it may be that out of these consultations arose the notion of her role negotiating with sites. (The other two linking agents discussed in this report make no mention of role negotiation with their

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* The linker read this and wished to point out that the change agent training never happened, much as she would have liked to do it.

sites.) That the agency designated the linker role as a full-time position, requiring 100 percent of her time, probably compelled her to explore and develop the role to its limits.*

THE LINKING AGENT'S USE OF RESOURCES

The Northeast linking agent, for the most part, seemed to rely on the resources provided by Consortium Central and her agency somewhat more than any other resources which may have been available.

USE OF THE CONSORTIUM SUPPORT SYSTEM. Of the wide array of resources made available through the Consortium, she mentioned five as having particular value to her:

1. The network of linkers -- She felt herself to be a part of a network of Consortium linkers, though she confesses not doing much to express this feeling, other than calling very occasionally to talk over ideas. Yet the sense of being part of something larger persisted; her supervisor explains it as simply an attitude based on knowing oneself to be contributing, along with one's peers, to the shaping of an educational role that is just emerging. The linker spoke also of the "bridge" that seemed to exist between state facilitators and Consortium linkers, noting that her network encompassed other linking agents at her agency as well. Other R&D Utilization people were included too: she spoke of the value of attending the Dissemination Forums and meeting people from the Georgia and Pennsylvania projects, who were doing "similar but different" work, and of maintaining a little telephone contact after such meetings. She contributed by sharing her ideas in presentations at AERA and the Dissemination Forum, and in exchanges with other linkers.

2. Consortium meetings -- The Northeast linking agent considered the training sessions, particularly those in the early portion of the project, to be extremely useful: (a) a reading consultant laid out some of the basics in reading approaches; (b) some good tools were introduced, like a curriculum analyzer for matching needs and curriculum features, and the Chalk Talk simulation for assessing needs; (c) the Project Director did a nice session on training theory and planning, that was great for setting up state-wide conferences; (d) Gene Hall gave a good presentation on the Concerns Based Adoption Model, which for the linker "was an insight that came from the out-

* After reading this, the Northeast linking agent felt that this supposition was accurate.

side and rang true with my experience"; (e) the critical incident reports, which involved writing up problem situations and sending them to other linkers and a Consortium Central staff member for feedback, about which she says: "I loved that idea, and wrote up all these dumb things I did, but people didn't trust each other enough at that point to be willing to reveal their mistakes or problems, so the idea died."

She considered the sharing sessions of the Consortium meetings very valuable, noting that they were actually an extension of the critical incidents, except done in person with the group in a structured way:

> Getting together was always wonderful. People were really good about listening to each other, engaging in each other's problems, giving advice. That was the best part of those meetings for me. And after them, I would call people more. I guess if we had been getting together more than twice a year, I probably would have called them more.

3. Consortium Central personnel -- The Linker Support Specialist was of considerable help, and the Northeast linking agent used him frequently for bouncing ideas and getting new ones. She said:

> He acted as a consultant to me. I often sought him out to talk through a problem. He listened and helped me work through it. He had something of a therapist mode, which was helpful, if a bit limited at times. And it was useful to have him go to the schools on circuit rides, because afterwards we'd always talk at length about what we thought was going on.

She tended also to seek out the Consortium Project Director, whom she described as "a real good consultant, especially skilled at providing alternative strategies and at helping me to think through all the issues."

4. The Tool Kit -- The linker used many of the articles quite a lot, and would go back to them often for reference or reinforcement. She found the indexing difficult to use, though, and later took on the job of redoing the index with organization by topic.

5. Other Consortium products -- She found the proposal to be an invaluable guide to the tasks and the approach expected of linking agents. She referred to the proposal as a "blueprint," particularly for the first year, saying that she read it at the beginning of each year, though it was less helpful for the second and third years. The milestones, she reported, were also good, because "they fleshed out what was in the proposal."

USE OF AGENCY RESOURCES. The Northeast linking agent cited three types of resources at her agency that were especially useful:

1. The agency supervisor -- Unlike other linkers, she did not have a supervisor until she negotiated for one at the start of the Consortium project. He started in September 1976 and had specific responsibility for her project, met with her from time to time, and evaluated her at the end of the year. He didn't, however, attend any Consortium meetings. The linker also had access to the agency director, who read all of her contact reports. Contact with both him and her supervisor was on an as-needed basis, though often it happened "on the run" in the hall, and sometimes couldn't be worked into busy schedules. Feeling the need for an ongoing connection with someone at the agency and for a supervisor to represent her at Consortium meetings, the linker regarded her project's switch to her current supervisor's area as a sensible one, since "he had responsibility for all of the programs in the state, and besides, he wanted to attend Consortium meetings." She estimated that during the second year, she and her supervisor met once a month. He read all of her contact reports regularly ("I didn't have to spend a lot of time bringing him up to date"), and she prepared a monthly summary of her activities as a basis for discussion at their meetings. She said of her supervisor:

> I never really used him as a consultant, because he's not a field person. But we would work through some things. He was always supportive and always made himself available to me. It was good for me to have that ongoing person to talk to.

   The supervisor referred to himself as a "ready ear" for her, noting that the linking agent had strong ideas about what she wanted to do ("she'd worked on her own essentially for a year"). He said that he'd add some of his ideas, and she'd go off and do whatever she felt was best. He thought that he had helped her particularly in such areas as time management and the budget. Their regular contact lessened during the third year of the project, and seemed to consist mostly of occasional updates and work plan checks.

2. Other agency people -- The linker felt that she had a large stable of talented people available to her, people quite skilled at doing the kind of work she was engaged in at her sites. She stated that she used them very frequently by structuring discussions with them and by informally bouncing ideas off them, and added:

> It's really been helpful to be in an agency where there are other diffusion activities going on. People know people, so it was always easy to get good recommendations for trainers and to get connected with other project people.

In addition, there were others at the agency whose areas of expertise included implementation, evaluation, and management, whom she could tap. The agency's practice of allowing staff people to give up to 10 percent of their time to collaborating on other projects encouraged her use of other personnel.

3. Professional development opportunities -- Aside from the advantages of conferring with agency people on particular issues, the above-mentioned "10 percent rule" allowed her to collaborate on their projects, which broadened her horizons. In addition, the Northeast linker noted that there were always a lot of seminars and workshops in progress at the agency, which were available to staff. "There were almost too many for awhile," she said, "they took time, and I could have been out in the schools." One in particular, on reading, was extremely helpful, and she later used the presenter as a consultant at several of her school sites. The agency paid for her trips to two AERA and two Dissemination Forum meetings, at which she made presentations on her Consortium work.

●●● Observations on the linker's use of resources: The overall impression of the Northeast linker's use of resources is that it was rather sporadic. During the first year, she had a very clear conception of her role and was quite comfortable in designing activities to carry out her major tasks. In short, she didn't need much help. As she moved into the somewhat more unfamiliar territory of the second year, implementation, she seems to have turned to resources close at hand--Consortium Central staff and people in her agency--and continued to do so during the third year as well. One senses that it is important for the linker to be self-reliant, to call upon others only when necessary. This notion comes out clearly, in fact, in a discussion regarding her desire to establish an ongoing relationship with an agency supervisor, in which she stated:

> I don't like to seek out help. It's always a problem for me. I usually wait until I'm desperate before asking for help, unless there is some mechanism that encourages discussion on a regular basis. Then I'm inclined to ask for help as I need it. I decided to try to head off that kind of situation by getting a regular connection with someone at the agency.

Given this "regular connection," or a system structured especially for giving support, such as Consortium Central or the agency, the linker tended to utilize resources. She observed:

> I'm very organization oriented. If it's somebody's job to do something, I use them that way, especially if they're charged to do something specifically.

This tendency toward self-reliance, qualified with the use of resources as needed, fits with the much-described isolation and independence of the linking agent role, or "the loneliness of the long-distance linker."

THE NORTHEAST LINKING AGENT IN ACTION

For all three years of the project, the Northeast linker devoted 100 percent of her time to Consortium work. This represents a departure from the amount of time spent by most other linkers (80 percent), as did her agency's contribution of her supervisor's time to the project.

She spent about 20 days per year at each of her four sites during the first two years, less during the third.* The first year involved bi-weekly meetings with the multi-constituent groups; meetings with principals, assistant principals, curriculum coordinators, and assistant superintendents; training sessions; and informal chats with teachers and other district personnel. She estimated that documentation of her activities that year required approximately 15-20 percent of her time. For the first year, the 100 percent level of involvement felt about right to her.

The second and third years called for a shift in focus and application of her skills as the school people moved into implementation and then routinization of their new programs. While the linker continued meeting regularly with the multi-constituent groups (this seemed to drop to about once a month per site**), the principals, and the assistant superintendents, she took on a new function in the second year: troubleshooting. This involved frequent visits to classrooms and informal conversations with teachers so that she could diagnose problems with the implementation and get them resolved, either "locally" (within the group, with the principal, with one or two teachers, or by herself), or by linking site people with a needed outside resource (such as a reading consultant).

The third year was a continuation of the second, with an additional component of "settling the program into a more or less permanent niche" and exploring ways of diffusing it within the district. Both of these years called for more linker time spent in developing her own knowledge base of implementation, evaluation, and

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* The linker adds that during the third year, she spent about 60 percent of her time on her work with sites, 30 percent on re-indexing the Tool Kit, and 10 percent on proposal development and other agency projects.

**The Northeast linker points out that this drop in frequency of group meetings was negotiated with the sites.

diffusion issues. The amount of time required for documentation was judged to have decreased to about 10-15 percent for these years. The linker thought that working 100 percent during the last two years seemed high ("sometimes I felt like I had to make up things to do"), though this feeling was somewhat mitigated by the work plan she negotiated with the sites and the greater variety and extension of activities in which she involved herself.

Five major phases of the Consortium linkage work (entry, problem identification, program selection, training and implementation, and disengagement) provide the framework for looking more closely at the Northeast linking agent's activities at two of her four sites: Bridgetown, an elementary school in a small port city, and Jefferson, an elementary school in a suburban community located midway between two major cities.* Both sites are briefly described.**

THE SITES. Located in a once-thriving port city that has experienced a strong shift from a predominantly white working and middle class population to a black and Puerto Rican welfare one, the Bridgetown school has been characterized as one of the few remaining hopes in the midst of decline. The city has lost half its population (now about 25,000) in the past 10 years, mostly as a result of a great fire that swept the city, destroying much of the middle class residential area and the small manufacturing plants. Half of the population now survive on welfare or Social Security. The schools have aggressively sought and obtained federal and state funding; as the largest elementary school, Bridgetown receives a lion's share of Title I money. It draws students from the remaining white families as well as the black (about 12 percent) and Puerto Rican (25 percent) communities, split about equally between welfare and working class, with another 10 percent from the middle-middle class. Serving about 1300 students in K-8, Bridgetown houses seventh and eighth graders in the central portion of the building and K-3 and 4-6 graders in two wings, each administered by an assistant principal. Teachers are mostly young and white, often working on a provisional basis, given the ever-present threat of staff cuts due to the shrinking tax base. They create a warm climate in the school, and are said to like and care a lot about the kids. The new principal was brought into the school in September 1976, when the previous one retired. Reading comprehension proves to be the main problem area, made more complex by the ethnic diversity of the students.

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* The names of both schools are pseudonyms.

**Descriptive data on the sites are taken from Elliott Krause's case studies and from Holly Gunner's and Stone Wiske's epilogues, all of which were prepared for the Consortium Report Series. They are recommended if more detailed site information is desired.

Jefferson is situated in a suburban community of approximately 19,000 people, 99 percent of whom are white, and mostly working class, who commute to one of the two large cities located 30 miles away. The citizens have been described as anti-education and anti-intellectual, and are noted for their tight hold on public spending, a fact well underscored by their defeat of striking teachers: they refused to meet any of the teacher demands and the court proceeded to jail a few teachers as well. The community has a substantial group of Italian- and Franco-Americans. Jefferson is the largest of the elementary schools; its staff of 25 serve over 600 students in an older building that was renovated several years ago to create "open space" classrooms--large, rectangular open areas staffed by teacher teams of three working with about 75 students. The open space was mandated by the central office and doesn't sit too well with the staff and some of the community. The principal has been characterized as paternalistic yet democratic, caring and extremely supportive. He eats lunch with the students so that he can chat with them, and he enjoys a close working relationship with the teachers in his building, one that persisted throughout the bitter and unsuccessful strike. Student achievement scores in reading were the lowest in the district, but not severely low compared with national averages. The main need seems to be one of creating continuity in the language arts program.

SITE SELECTION. The Northeast linking agent was not involved in selecting sites. At the time that the Consortium proposal was written, school districts were asked to participate, based on: (1) indication of their interest in focusing on reading as a priority in the coming year; (2) their history of working well with the agency (and, implicitly, the desire to implement innovative programs); (3) availability of a K-6 school with a substantial Title I population; (4) their ability to provide geographic and demographic representation across the state. Districts were asked to select appropriate schools, and their letters of commitment were included in the proposal's appendices.

The Bridgetown district had worked previously with the agency's State Facilitator project, which aids school people in learning about and adopting innovative programs. The assistant superintendent, an innovation pusher within the district, felt that the Bridgetown elementary school could benefit from an intensive intervention in the area of reading, given its large Hispanic population and the need to address reading comprehension.* In addition, Bridgetown represented an urban setting, complete with all of the complexities and challenges of shifting populations, a maze of federally funded school programs, and a declining economy marked by increasing welfare rolls and shrinking tax

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* The linker adds that there was substantial pressure from the Bridgetown K-3 teachers for help in reading for the school's Hispanic population.

rolls. Interestingly enough, the beginning of the Consortium project came at the point when one principal was retiring and the other was starting his new assignment, an opportunity which probably did not escape the notice of the assistant superintendent, who was something of an internal change agent within the district. In fact, the linking agent noted that the outgoing principal knew nothing of a Consortium meeting which the assistant superintendent had scheduled at the Bridgetown school for the last day of the school year in 1976 to include himself, the linking agent, and the two assistant principals.

The Jefferson district had had a successful project previously with the Northeast linking agent in the State Facilitator program. A needs assessment had targeted reading for attention. The Jefferson elementary principal was eager to participate in the Consortium because he hoped that such involvement would brighten his school's reputation in the community, which was somewhat tarnished by their disapproval of the open class approach and students' lower achievement test scores. Jefferson was the only K-6 school in the district and had a relatively large Title I population. Community size was small, suburban, and stable. The student population varied from the more typical, urban area groups in that it was practically all white. The superintendent had already contacted the agency's state facilitator for aid in training a number of selected teachers in a new reading program being adopted by the district. Jefferson teachers were to be involved in that training, with the understanding that if the Consortium project were funded, they would withdraw from the first program in order to participate in the more intensive, and better funded, Consortium alternative, which is what happened.

●●● Observations on the linker role during site selection: As mentioned already, the Northeast linking agent played no part at all in site selection; it was done at the proposal development stage and pre-dated her involvement with the project. It might be conjectured, however, that her previous association with the Jefferson district may have played some part in the district's selection as a site and in hers as the linker: the district was known to the agency through the linking agent's work, and the linker's success quotient in the district was also known to the agency. The implication of an already-established connectedness and accompanying good feelings between the district and the linker was another plus in the equation, which may have led to their subsequent match in the Consortium project.

ENTRY. The Northeast linker's first contact with the Bridgetown site occurred in June 1976 when she met with the assistant superintendent and the two assistant principals to give an overview of the Consortium project and to answer any initial questions. A follow-up meeting on 3 September included the new principal and

consisted of a review of the Consortium design and a discussion of the multi-constituent group--its function, membership, tasks, and meeting schedule. A list of criteria were developed for membership of the group, and dates were set for a presentation to the whole faculty as well as for individual interviews with randomly selected teachers. The linking agent noted happily:

> The Bridgetown people are enthusiastic, intelligent, and sensitive to the issues. They raised issues that I would have had to if they were not so skilled, like criteria for group membership and the need for developing support for the program in different parts of the school community. I was impressed with the principal who summed up ideas and at the end of the meeting asked, "what are our next steps?," then began outlining them. I'm looking forward to working with these people.

About 50 people attended the faculty presentation on 16 September, and the linking agent said, "the tone of the meeting was very much one of administrative support for the program." Her presentation consisted of a 20-minute talk, accompanied by a one-page explanation of the Consortium and a letter from the Project Director that described the agency, both of which were handed out. The question-and-answer period was supported by the assistant superintendent and the two assistant principals, who asked clarifying questions and added to some answers given by the linker. She was pleased with the friendly nature of the session, and noted with some admiration that the school people had thought to invite a parent, who was present, and who had agreed to serve on the multi-constituent group.

The first meeting of the multi-constituent group was held on 21 October and involved an overview of the Consortium project and the group's role in it, as well as the beginnings of identifying the reading problems at the school. The linking agent handed out an inventory for assessing individuals' views of the strengths and weaknesses of the district's curriculum improvement effort. The meeting was relatively short, and the linker commented:

> This was an exceptionally nice group, but a little odd in its composition. There were no parents and an awful lot of administrators. A few didn't seem to have much connection with the Bridgetown school. But, I was very impressed with the way they listened to one another and with their commitment to the work ahead.

Membership was altered, to bring in more teachers and to drop the "extraneous" people. In this move, the Title I director appointed a Title I teacher to take her place, which had later consequences for the program. Two parents were added to the group. The principal, new to the district and to the school, decided to delegate responsibility for the project to one of the assistant principals, so that he could tend to his other duties. Although he still attended the group's meetings, his role was of a quieter nature, and the assistant principal took over the work of arranging

meetings with the linker and carrying out the school-end logistical tasks. The linking agent came to view the principal as "not obstructive, but just not seeing the Consortium as his program. In his own mind, he thought he was supportive."

Entry into Jefferson was only a bit less even than at Bridgetown. A June 1976 meeting with the principal and two reading specialists was followed by a second overview meeting on 1 September with the principal and the new language arts and reading coordinator for the district, who would serve as the central office representative to the multi-constituent group. At this meeting the nature of group membership and its function were agreed upon, as well as the type of approach the linking agent would take at her presentation to the school faculty. The linker called this meeting more relaxed than the first, noting that the principal seemed less harried and more open to the concepts of the Consortium. She also indicated a concern:

> The principal is not a very good listener. He interrupts. He doesn't seem to hear what I say, and I find that somewhat difficult to deal with.

She later qualified this comment with a handwritten addendum:

> On the other hand, he's really nice, made enough on-target comments that I believe he gets the gist of what the Consortium is about, and seems to have good relationships with the people he works with.

The linking agent gave a similar presentation at Jefferson to that described in the Bridgetown section. The whole staff came to this meeting, which was held on the first day of school. The linking agent noted that the principal "introduced me by the wrong name" and she described the question-and-answer period in terms of the few questions that were "slow in coming. The group was not very responsive." She worried, too, about her lack of interaction with the principal, either before or after the session when he was tied up with other people, and wondered if his busyness might not have a negative effect upon the level of his support for the program. Later, from the individual interviews she conducted with teachers, she learned that the principal is generally thought of as "disorganized, overworked and prone to promising things he doesn't deliver." She speculated:

> He still hasn't "bought in" and I want to enable him to see this as his project and me as a consultant who could be helpful to him. He may feel he was chosen because the superintendent thought he needed the help.

The first multi-constituent group meeting was a no-show, because the principal forgot about it and failed to invite people. The linking agent took this time to have a serious talk with the principal about things she could do to help him and how their

working relationship might be improved. She pointed out that she saw him and his school as her client and was available as a consultant to him on broader organizational issues as well. They established some ground rules, and the linker later recorded:

> Even though I was very upset about this incident, it may turn out to be an important turning point in our relationship....I am going to have to work with him on organization and follow through.

The group's first meeting took place on 8 November, and the linking agent helped them "to catch up" by asking the principal to distribute copies of the curriculum improvement inventory ahead of time. She then put their responses to the influential factors section of it on newsprint so they could begin discussing them. The meeting went very well, and the linker was pleased and surprised to note that there was considerable agreement in their individually written responses to what they thought was the main problem in reading. She was heartened by the enthusiasm and level of participation, and noted with pleasure that they chose to set their next meeting for the following week.

●●● Observations on the linker role during entry: The linking agent's interpersonal and group process skills made her entry into Bridgetown an easy one. She was careful to touch base with the necessary people, and to prepare thoroughly for all of her contacts with site people. She made her role very clear and did the same for participants in the multi-constituent group.

Jefferson, though still a positive entry, presented more trouble, owing to the principal's tendency to drop the ball from time to time. This was more of a problem for the linking agent than for anyone else, and her handling of the situation was extremely effective. She brought her interpersonal skills into play by first reassuring him of the nature of her helping role and then developing a plan with him to work together in mutually satisfactory ways. Her ability to read the situation and her willingness to pick up the dropped ball and toss it back and forth, so to speak, with the principal did represent a turning point in their relationship, as she had hoped it would. Her notation to help him with organization and follow through was accurate, and in fact, became institutionalized as a major part of her role at Jefferson. She continued to show extraordinary patience and skill in dealing with his many good-natured fumbles (forgetting to return calls, distribute copies) and worked diligently with him to improve his organization.*

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* The linker felt this was unfair to the principal, noting that "he had good ideas, was involved in the project, worked openly in planning, and engaged well with people at meetings. He was crucial to the project's success."

> Entry at both sites shows the linking agent to be an initiator and an intervener, exercising her interpersonal, problem-solving, and collaboration skills.

PROBLEM IDENTIFICATION. The Northeast linking agent propelled the multi-constituent groups through this phase by conducting a state-wide conference for all four sites on 12 November 1976. Coming at a point in the process when each group had met once or twice, the all-day meeting boosted their initial enthusiasm, connected them to the "larger effort" of the Consortium as a state- and national-level project, and grounded them in some techniques for defining curricular problems.

The linker developed a problem statement activity that drew from two R&D packages (one dealing with problem solving, the other with determining instructional purposes) and handed out the synthesized criteria and worksheets to small groups with instructions to write a problem statement. Their ideas on how to develop problem statements were then compared with a "recommended" approach before they began to work on actual reading problem statements. Another activity engaged the school groups in using the problem statement worksheet to work on their own school's reading problem. Bridgetown completed a first cut at theirs. Jefferson chose instead to work on developing parent, student, and teacher surveys in order to get a broader base of information first.

Reporting on how the state-wide conference had gone, the linking agent was very enthusiastic:

> This day was an outstanding success! It served as a team building session for both the school groups and the total group, as a training session in problem definition...and as a work session where school teams made progress on their own work.

She related several participants' excitement at coming together, one of whom said:

> This is the first time I've gotten a sense of this project as larger than our school. It's really exciting to be with the other people and I think it's important to do it again. People are really finding it significant to be with one another, and there's a sense of beginning relationships that it would be nice to develop.

Noting their high level of motivation, the linking agent added:

> People generally feel good about the work and me. In the presence of people I genuinely like and with whom I have a good relationship, I felt comfortable and relaxed....I think all of the groups will be able to complete their problem definitions in one or two more meetings.

Bridgetown had already worked on defining their main problem by using a worksheet with existing-state and desired-state categories before going to the state-wide conference. Having developed a rough problem statement at the conference, what remained for them was to refine it, which they did at their 9 December meeting. They then decided to get reactions to their problem statement by distributing it to the whole Bridgetown faculty. To energize a "draggy" group "meeting'd out" and fatigued from holiday activities, the linking agent scheduled a full-day retreat, away from their work-a-day concerns, for developing a final problem statement that incorporated faculty responses to their draft, selecting criteria for a suitable program, and involving parents, whose participation by this time had become negligible.

This all-day meeting, held on 21 January 1977, resulted in a final problem statement (teacher survey data revealed widespread support for the problem focus) that identified the main problem as students' lack of understanding of what they read, caused by poor language development due to low vocabulary growth and an absence of home reading and knowledge of language, especially among bilingual students. A good start was made on selecting program criteria through the use of a curriculum analyzer activity calling for them to list their preferred attributes of a good reading program and to share these individual assessments with others in the group. The linker noted that this activity stirred excellent discussion of many of the issues. One-page program descriptions and sample materials were distributed to group members, who were asked to pair off and examine one program in depth according to the curriculum analyzer by the next meeting so they could report to the whole group. Of this meeting, the linking agent stated:

> The full day was a good idea, I think. We had the time to discuss peripheral issues like additional staff input and communication with parents. Interestingly, community involvement was defined by this group for this school to mean exclusively communicating to parents what the school and program were about. And, the curriculum analyzer promoted a good discussion of the important issues.

For Jefferson, the state-wide conference provided the group with the groundwork that enabled their relatively speedy resolution of the problem identification phase. They had developed a survey and distributed it at the parents open house, where they'd set up a booth. At their 18 November meeting, they examined the results of their parent survey, most of which were positive and supportive, and decided to send them to parents, teachers, and the press. With the results of the teacher survey, the linking agent suggested they use it to try to develop a problem statement, all the while keeping student outcomes in mind. This proved to be a difficult and frustrating task for them, but the group managed to produce a list of problems that existed. Not feeling good about the way the meeting had gone, the linker sought the principal's support and advice. He suggested that she mail copies of the generated list of problems to group members so they could

think about them before the next meeting. This idea proved to be a good one. Using the problem statement worksheet from the statewide conference, the linker guided the group through the problem statement process at the 10 December meeting. They were prepared for it, engaged in the task readily, and accomplished the work. The linking agent had anticipated their success and opened a bottle of wine which she'd brought to celebrate the event. "They loved it!" she said. And the principal told her that she ought to feel good about the meeting too, since she was providing "a real and much needed service to the school."

The Jefferson problem statement indicated a lack of continuity in the language arts program, as evidenced by students' having to repeat skills they'd already learned, at times not transferring skills from one content area to another, and tuning out of classroom activity. The group indicated their belief that this problem was caused by the use of a wide variety of programs without a coordinating, integrating structure, and by the teachers' need for training and communication with each other in their use.

●●● Observations on the linker role during problem identification: The Northeast linking agent didn't incur much pressure to skip the problem identification stage and get on with looking at specific programs. Only one person at one site pushed for examining the product pool, about whom the linker noted:

> She hasn't been a particularly helpful member of this group. She's the only one who pushes for looking at the programs--this from a curriculum specialist who, I think, should be more supportive of a systematic curriculum development process.

It may be that the linking agent didn't leave herself open for such pressure, given her firm guidance of the school groups during meetings. She is a skilled process enabler, with experience in cutting off inappropriate discussion, as evidenced at a Jefferson meeting which began to digress into a general conversation on open classrooms, before she halted it by saying:

> I'm making clear to you what I can and cannot do. If you as a group want to work separately on this issue, it might be effective and is fine with me. But I don't want to spend a lot of time in these meetings dealing with a problem that, in this context, is peripheral.

She added, to herself: "Surprisingly enough (at least to me), this seemed to go over well with them." Her use of tools to aid the multi-constituent groups in identifying problems is noteworthy, as is her ability to anticipate the group's needs and do something to meet them. This comes most clear with her arrangement of an all-day retreat for the "draggy" Bridgetown group, and with the wine celebration for marking

Jefferson's success. She managed to move both groups briskly and painlessly through a process that to many school people is frustrating and time consuming. The value of stating problems before considering solutions was questionable for at least one Jefferson group member, who reported that she felt "vague" about what they were doing, and later added:

> Maybe it's because we don't usually go through this kind of procedure. You [the linking agent] had us come up with the design before looking at the programs. As soon as we started to look at the programs I got clearer about what we were doing.

A few others agreed with this statement, according to the linker. This "vagueness," or perhaps stated more specifically, this added step in a curriculum selection process (for school people unaccustomed to assessing the problem before selecting a solution) may have contributed to Jefferson's subsequent difficulty in choosing a program for implementation. The linker, much later, said it was hard to know when the problem was identified, and that she tried to be as specific as possible with groups about what kind of outcomes they should expect and how they might interact to make them happen. "We sort of had to feel our way, though," she said, "and the problem, once identified, had to feel 'right.'"

PROGRAM SELECTION. The linking agent worked steadily with her sites to encourage them to look objectively and systematically at various programs before making a choice. At Bridgetown, when the group had difficulty responding directly to her call for selection criteria, she conducted a discussion of several reports on programs reviewed by pairs and listed what appeared to her to be implicit requirements. She then presented this list as the beginnings of a set of selection criteria; the group ratified it and added other possibilities. The multi-constituent group pushed for seeing the programs in action right away, having discarded several on the basis of their analyses of program materials. The linker said she would have to be "hardnosed" about paying for visits: she didn't believe that their list of questions about the remaining programs was pointed enough to merit visits, and observed that many of the questions could be answered from perusing the product literature or were too general to be addressed by users.

Concerned that they "didn't know what they need to know," she aided them in developing an observation checklist to be used on site, and suggested that they complete it before the next group meeting. She arranged site visits for the two "finalist" programs, and accompanied selected members on one of the trips. When visits were completed, she conducted a lengthy meeting in which the pros and cons for each program were listed by the group and recorded on newsprint, a poll was taken, and the result was unanimous for one of them. The group decided to get more input, however, before

making a final choice, and it was agreed to ask teachers outside of the multi-constituent group to visit the favored program too. The linker arranged for three more visits by other interested teachers to the demonstration site, and registered her surprise at their choice:

> They were so hot for the other program all along. But their assessments of the programs were balanced. They seem to have made a responsible decision, and they're already working to build in supportive mechanisms by having other faculty members join them on more site visits. I feel they are making a good choice.

On 19 May 1977 a final vote was taken, with three other teachers who had made site visits sitting in on the group meeting. Once again, it was unanimous for ratifying their first choice. All of the teachers volunteered to implement the program in their classrooms.* In spite of the group's effort to draw other teachers into the selection process, the Northeast linking agent noted some of her discomfort:

> It feels as though there are still a lot of bases not covered here: reading people, Title I, even the principal. I'm not sure these people feel that <u>their</u> interests are being protected. They still may have to be "sold" on the program.

The teachers' enthusiasm was clear enough, even though balanced by their scheduling concerns. On the whole, the linking agent felt that the decision was a good one, though "much work remained to be done."

On 6 January 1977 the <u>Jefferson</u> multi-constituent group identified criteria for a suitable program and began to examine program descriptions with the use of the curriculum analyzer, to which the linking agent had added some categories. Said the linker:

> The curriculum analyzer activity has never failed to produce a stimulating discussion of what people think are important elements in a curriculum. People were really involved, anxious to share their answers and to hear others, eager to discuss implications. I played a minimal facilitation role, which probably helped to get things going and to probe areas that could have gotten glossed over.

The linking agent coordinated a plan for pairs to examine program descriptions and report on their observations to the whole group by comparing the programs with the group's criteria.

After six programs had been reviewed, and three eliminated, the linker suggested the addition of another for consideration. She

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* The linker points out that all of the adopting teachers had first seen the program in action.

delivered actual program materials to the group for study before the next group meeting, and reproduced copies of their problem statement so they could look at the programs with that frame of reference. The principal suggested a meeting "so the group could plan the school visits. I don't want them to just look around. They should know what they're looking for and maybe we should develop an observation instrument." The linker suggested that he conduct this portion of the meeting, while she wrote ideas on newsprint, an arrangement that worked well and resulted in a good, categorized list.

The linking agent made arrangements for the group to visit three programs in action, and also had prepared a program visit report form for their use. The group elected to take non-group members of the faculty with them on the visits, a move described by the linker as a "good, first step toward communication with the rest of the faculty and a means of building support as they go along." She accompanied the group on one of the visits as well. After the visits, one program was dropped from consideration, the second was analyzed in a discussion of pros and cons led by the linker, and the third was thought to require more visits by others. The linking agent was asked to make a presentation to the entire faculty on the two contending programs because she was "objective and had no ax to grind. Also, as an outsider, she could catch flak." The linker says:

> I presented each program in a pretty straightforward manner. There were some questions after each and then more after I had finished both. I posted newsprint sheets so they all could see both programs' features side by side. Mostly this was an information-gathering meeting for the faculty. I got no clear indication from them for one program or the other.

When several people started discussing a trial run with the idea that they could drop the program if it didn't work out right away, the linking agent took a strong stand:

> You should give your choice a real shot. Though you can drop it after a suitable time, you shouldn't go into it with the idea that you can get out pretty quickly. And unless I hear a lot of enthusiasm for the _____ program, I would recommend not choosing it because it's a difficult program and different from what the rest of the district is using. Without real interest in it, you'd be better off with the other one, since many other schools in the district are already using it and good training is available.

The multi-constituent group polled teachers later on the two programs. At their 16 May meeting, with the poll results heavily in favor of the "difficult" program, the group began talking about training and implementation of it. The linking agent asked if they were choosing this program, and everyone said yes. The principal added, "it looks like a mandate to me."

●●● Observations on the linker role during program selection: Throughout, the linking agent served as a process enabler, guiding the group, helping it to be systematic, keeping it on track, and facilitating discussion. At one point, at the Jefferson site, she referred to her role as more that of a discussion leader than a "meeting runner," and expressed discomfort with this "lack of control." But perhaps she served to promote more clarifying and probing than she thought. In addition, she once again shows how well she senses group needs and acts on them:

> People straggled in one at a time, everyone seeming harried and tired from a bad day. Before we started, I asked people to be quiet and breathe deeply for a moment, to remove themselves from their hectic day. I don't usually do things like this, and it worked very nicely.

She shows a willingness to "give up" some control by sharing tasks, as happened when she asked the principal to chair a portion of a meeting and, on another occasion, when she suggested that one or two other people in the group take responsibility for preparing a report of the multi-constituent group's work to date. She was not shy about asserting her expectations (developing an observation checklist, calling for a clearcut decision on a program), and got good results from doing so, though the eventual decision at Jefferson gives a sense of having been slid into, as if the group were simply going along with the faculty poll outcome.*

Their commitment to the chosen program isn't stated as strongly as the linker seemed to hope for. Of the choices, she said:

> I think there were pretty close matches in all four schools between the product and the problem. What really impressed me was that in several schools at different points, somebody would suggest that the group check back with its identified problem or recall that _____ was one of the biggest problems and it should be emphasized at this stage. That said to me that they were conscious.

It also points to school people's internalization of the identify-the-problem-first stage before seeking a solution.

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* The linker disagrees, stating that the group really wanted that program. "I probed to see if it was a vote against the other program, slowed them down on the decision, because it's such a demanding program. They decided to conduct an individual poll of other teachers, which ended up verifying their choice."

TRAINING AND IMPLEMENTATION. The Northeast linking agent played a key role at both sites in negotiating adequate district commitment to the program implementation with the central office. At Bridgetown, she was designated by the school people as their representative to meet with the assistant superintendent to bargain for district funds to support training costs of teachers' pay and materials. She came back from that meeting with assurances for all that the school had wanted, not with what they were willing to settle for. At Jefferson, she and the principal met with the superintendent, and the linker deserves the credit for obtaining a commitment of $1200 to support the training effort (where there had been no allotment previously) and sufficiently impressed the superintendent for him to ask her to make a school committee presentation on the new program to be adopted. She was firm in her approach and well informed on district financial problems, but most of all, direct in saying what she expected in funding as an expression of district commitment to the program. She reported later:

> I am thrilled at the results of this meeting! The principal is too, and I think he's giving me a certain amount of credit for it.

In addition to getting district financial commitments, the linking agent worked with the groups at both sites to sketch out elements of the implementation plan for use during the coming year.

She arranged the training session, which occurred on 22-26 August 1977, and was attended by 10 Bridgetown and 19 Jefferson school people, as well as two representatives from the National Institute of Education and the Consortium Central Linker Support Specialist. She attended the full-week session as observer/recorder, writing copious notes of what was done, and focusing particularly on areas that would call for preparation before implementation and on issues relating to the program's intersection with the rest of the school curriculum and staff. She described the training as "intensive and exhausting," pointing out that each day went from 9 to 4, with only a half hour for lunch, and added:

> Teachers were given homework at night consisting of memorizing the directives for teaching words by particular methods. They then went over it with the trainer before 9 am or during the lunch break. The trainer was excellent and very charming, really had people with her. The first three days were exhausting, and teachers felt that Thursday and Friday were lower key, that "things fell into place" for them.

She described her own role:

> I found it wearing to be in a linking position this week. I was answering to a number of people: all of the teachers with their complaints and insecurities, the administrators from the schools, the NIE folks, and the trainer. It was difficult to be in a position of having to troubleshoot for so many little problems and receive none of the benefits. That is, all of the glory went to the trainer; all of the complaints and problems came to me.

At Bridgetown, implementation proceeded fairly smoothly, with a few ripples from the Title I director, who was feeling left out. It was left to the linking agent to remind her of her decision to appoint a Title I teacher to represent her on the Consortium committee, and to calm her by instituting regular update meetings with her. In addition, the linker met monthly with the principal to keep him apprised of the new adoption. Two days were scheduled for linker interviews with teachers regarding their concerns and changes over the year, so that they could be compared with interview data obtained at the outset of the Consortium project. The linking agent met with a slimmed down multi-constituent group, renamed the Task Force, about once a month to monitor the implementation and correct any emerging problems.

At Jefferson, implementation was interrupted by a breakdown in teachers' contract negotiations in early September and a strike that followed soon after. There was great bitterness between teachers and the community, during which time the Jefferson principal showed his colors in a strong demonstration of his support and empathy with his staff. Much hugging took place on his doorstep at strike's end as teachers returned from their defeat at the hands of the community. Curiously, the teachers rallied and plunged into implementation of the new, and needless to say, demanding program. Krause speculated in his case study that it was "occupational therapy...and also gave them something else to complain about [besides the strike]." The linking agent, who had absented herself during this delicate time, was called on the day the strike ended and asked by the principal to come back as soon as possible "to pick up the pieces."

Implementation of the new program proceeded, and the principal reported getting good comments from parents who were already seeing a difference in their children's reading behavior at home. The linker met monthly with the multi-constituent group to monitor the program and they developed a plan for evaluation and for informing parents more specifically about the program. She wrote an article describing it, which appeared in the local newspaper, and drafted a letter for the principal's signature that, along with copies of the article, was sent out to parents.

In December 1977 the linking agent held a state-wide conference focused on implementation concerns for her four sites. Each group drew a symbol of their implementation and then gave a presentation on why they had chosen their particular program, what the program was like, and what they thought was especially good about it. The linker discussed Gene Hall's levels of use and concerns based adoption models and then conducted them through an exercise calling for them to list their concerns in terms of the models. She said:

> They were all at the management concerns stage, which is appropriate for people at the beginning of implementation. The concerns were the same, regardless of which program they'd selected--worrying about

> time, having enough materials, if they were "doing it right." I think it helped them to hear that everybody else had the same concerns, and that research shows that's what almost always happens.

The Consortium Project Director also spoke of the other school sites' experiences across the country, which apparently added to their growing sense of "being where they ought to be, and not behind."

Follow-up training was held at Bridgetown on 25 January 1978 in an all-day workshop at the public library, which, the linking agent believed, answered some of the questions to 4-6 grade teachers had had, and hoped had eased their frustrations. After her first round of classroom visits, the linker noted how relieved and pleased she was with the 4-6 grades:

> I was very impressed! I breathed a sigh of relief as I left the school today because things are much better than I had thought. The teachers need more positive reinforcement and need to feel more secure about what they're doing....It might be more helpful for them to get together than to have a consultant....I want to give them some attention and support.

In late March the linking agent met with five of these intermediate teachers to give them positive feedback and discuss ways of helping. They decided on a working day (Saturday) with the primary teachers, to prepare materials and help each other.

Meantime, the linking agent met regularly with the Task Force and decided on an evaluation plan that included examination of student papers, student interviews, and parent and teacher surveys. The linker created the student survey herself, adapted a parent survey used elsewhere, and worked with the principal in developing the teacher survey, all of which were to be conducted in May 1978.

The linking agent arranged a two-day advanced training workshop for 29-30 June 1978 for nine Bridgetown teachers and three administrators. She characterized it as "pleasant, upbeat, for everyone," commenting on the skill of the trainer and the fact that it was a good time to review the first year of implementation and solve those problems before starting the second. She attended the sessions and had her notes typed so that she could help teachers during the next year.

At Jefferson a Curriculum Day on 9 January 1978 was given over to an all-day session on the new program so that people could make suggestions for the next year. Follow-up training was arranged for 26 January at a parent's home. In addition to the content assistance provided, the linking agent observed that it offered a much-needed social occasion, including a pleasant dinner. In February the linker arranged for a Bridgetown teacher to visit Jefferson to share her experiences in the program and offer help.

The linker's meetings with the Task Force resulted in the decision to conduct surveys of students (linker-developed), teachers (linker- and principal-developed), and parents (linker-adapted from one used elsewhere). In addition, achievement tests were scheduled to be administered at the end of April, and a final report to the school committee was prepared for the June meeting. A main issue for the Task Force was providing suggestions for linking agent activities during the coming year, and a number of ideas were offered, including the conduct of workshops in change agent training and reinforcement/behavior management, as well as ways to discuss children's progress with parents; development of plans for parent involvement and support for new teachers; and testing for skills and comprehension. The linker was not too impressed with this listing, believing that group members didn't have a good sense of her skills and what she could offer to them.

The linking agent planned and conducted a third state-wide conference in June 1978 for sharing what the four school sites had accomplished during their first year of implementation. She planned an interesting comparative activity, which involved their filling out an inventory of how curriculum change takes place in their district, if and how people are involved, how satisfied they are with the process, and so on. After discussing the results in the group, she then produced the same inventory, which they had completed at the first state-wide conference in November 1976 (and hadn't remembered filling out before) and compared the results:

> The discrepancy was <u>enormous</u>. It was wonderful! Whereas before they'd filled out low involvement, low satisfaction, etc., this time around everything was marked high, and people said terrific things about how involved they felt.

●●● <u>Observations on linker role during training and implementation</u>: During this phase, the linking agent seemed to function in a number of different roles: liaison with the central administration; bargaining agent with the district for funds; resource arranger; linker/observer, as she noted training ideas for use with school people later; information giver, particularly with generating information for public relations; and evaluation designer. She seemed not to lack a variety of ways to work with school people, which makes her discomfort during the second year of the project a bit odd. No doubt it was the lack of clarity and the need to spread herself over a number of diverse areas that led to her search for a focused role. In examining the range of activities she performed and in estimating the level of usefulness she offered, she would appear to come out on the high side, even if school people weren't quite able to verbalize her role during the second year as well as they had during the first. She had trouble, too, remarking after a reading expert visited one school:

> I find myself somewhat uncomfortable in these events because my own role is so unclear. I don't have much to do, so it's very much like a cocktail party where I have to think up things to talk to people about.

While she takes greater satisfaction in leading groups through problem-solving processes, it seems that her transition from a process enabler to a linker, in the restricted sense of the term, with a strong coordinating component thrown in for the sake of interest (and necessity), was a successful one, however bumpy and frustrating it was for her. It was a tiring position, as she rightfully points out, and wasn't rewarded with anything that might amount to glory. Perhaps also, it was unfamiliar ground for her, particularly since she lays no claim to being a reading expert, so that she wasn't able to fall back on the well-known rewards of a job effectively done: she couldn't be certain that she was doing a good job because she had no way of knowing what "right" looked or felt like.

DISENGAGEMENT. The Northeast linking agent began the process of disengagement in the fall of 1978 when she started to pull back visibly from each of the sites. At Bridgetown, she met with the Task Force in September to talk about goals for the year. The group decided to disband, and the linker began meeting monthly with the district reading coordinator to check on progress, discuss parent involvement, and plan dissemination activities. She also met regularly with the new assistant superintendent to talk about further diffusion, by school building, of the program. The program had already started to spread when teachers gave district presentations the previous year, which resulted in teachers from other schools getting trained in implementing the program. Parent involvement remained thin at Bridgetown, and the linking agent's efforts to get the school to mount a full-fledged evaluation of the program met with resistance.

The program itself was running well ("things are in pretty good shape; they're taking care of things," she reported) with minimal assistance needed. The linker encouraged two members of the staff to give a presentation at an urban conference sponsored by her agency and said they did a pretty good job of it, but have not responded to her other efforts to disseminate information about their experiences with the program. In June she prepared a final report for the assistant superintendent and administrators, in which she gave a history of the project and summed up what had resulted so far. This report constituted a farewell, and a signal for the end of her involvement there. She noted that she felt confident of the program's stability in the school and added that the only thing missing was good evaluation data and a more cosmopolitan approach to dissemination activities.

At Jefferson the linking agent continued to meet regularly with the Task Force and together they effected more than did Bridgetown in the way of evaluation and dissemination, both of which the linker considered to be a real part of the disengagement phase. They worked on implementation problems and recruited parents to volunteer help in the program. The linking agent was most impressed by the Jefferson group's strong interest in dissemination, which was marked by their presentation at a reading conference, and, most especially, by their readiness to train some of their teachers to be trainers for the new program. Wiske, noting the number of dissemination activities the group was planning, wrote:

> They...enjoy generating well-deserved publicity for their school among members of the community, especially the school board. And...the teachers appeared to feel proud of their position as experts and of their competence in this new role.

The linking agent, having worked so closely with the principal throughout the project, selected him as the likely candidate for continuing where she left off. Part of her work that year, then, involved helping him to organize for taking over the details of keeping the program in good running order.

As with Bridgetown, the linker prepared a final report for the administrators that summarized the project and its achievements and served as a goodbye to them. She left this site with very good feelings about the program's place in the school and predicted that it would live a long life.

The linking agent's own view of disengagement is a straightforward one:

> It means that I'm pulling out and rounding off my involvement at the school as a three-year piece. And it means that I'm helping them to institutionalize the program, to get mechanisms in place, so that it will keep itself going.

●●● Observations on the linker role during disengagement: The linking agent had a sensible approach to the disengagement phase, which seemed to consist of telling the site participants of her approaching withdrawal, getting "the pieces in place," lining up people to take over her tasks, and looking for ways to expand the presence of the program beyond the school building perimeters. For the linker, this last task, that of disseminating and/or diffusing the program, serves as a means for "setting" participants' enthusiasm for and commitment to the program. By talking about what they do, they develop a sense of pride, which renews them after they've passed the routinization stage of implementation. More than the other linkers, the Northeast linking agent attended to dissemination and to institutionalization matters.

Her level of involvement with the sites began as a very intensive, highly guided process, moved to a midway level that showed evidence of her turning over several responsibilities to school people in the second year, and culminated in a third year of foundation building, in which a firm grounding begins to stretch out strands that actually serve to root the program even deeper into the district life.

EFFECTS OF THE LINKING AGENT'S ROLE

When asked to report the effects of her work on her sites, on the agency, and on herself, the linking agent listed the following:

EFFECTS ON THE SITES. In addition to having programs firmly in place, other effects included:

- Achievement scores in reading went up significantly, especially at Jefferson. In Bridgetown, district-wide testing has not occurred, but among students tested for Title I programs, a gain was noted in students who had participated in the Consortium reading program.
- Teachers are more knowledgeable about reading, feel more expert, and believe their teaching has improved. They are, for the most part, committed to the program they've adopted.
- The participants have improved self-images; they've done good work and they know it.
- The schools have an improved image in the eyes of district administrators and parents in the community.
- Most participants have a clear sense of the problem-solving process we used, and I think a number of them would be likely to use it for other issues.
- In three sites the schools are more cohesive, with teachers and principals working together as units.
- In one site the program has increased the rift between certain personnel and between certain programs.

EFFECTS ON THE AGENCY. There were several:

- The agency's reputation has been enhanced by another "success" story.

- Several wonderful letters from the sites have indicated how pleased they've been with the collaboration and suggesting that we do more joint programs.

- The good relationships between the agency and two sites will continue after the Consortium ends. For example, I was hired by one site to work on development of a staff evaluation system.

- The National Institute of Education is pleased with the work that we've done.

- The agency has learned more about linking processes and roles for linking agents at various stages of the program improvement effort. For example, it knows more about activities that can be carried out at the implementation stage and the routinizing part of a program.

- Agency learnings have been applied to a number of other projects, e.g., the State Facilitator project, in terms of the work we did and the resources we found effective, as in the Hall-Loucks materials on the concerns based adoption model and the levels of usage.

EFFECTS ON THE LINKING AGENT. These included:

- I think I've grown as a consultant and have learned more about long-term consulting in organizations. My self-confidence as a consultant has increased.

- I learned a great deal about schools and about reading and language arts.

- I had the opportunity to operate my own project relatively autonomously and to succeed in it. I think I proved my worth to the agency and have since been given numerous opportunities to be on panels, to do workshops, to become a project director, to manage proposal-writing efforts both inside and outside of the agency.

- This past year I was a member of The Management Group and next year will be project director of the sex equity project, for which I wrote the proposal in collaboration with one of the Consortium sites.

- I really liked the work and the intent to work over a long period of time with school people. It was very satisfying to me.

- I learned more about the National Institute of Education and federal programs, and had the opportunity to "represent" linking agents at an NIE planning meeting.

- I have had the opportunity to share my learnings through workshops in other states, through American Educational Research Association presentations, and through presentations at the Dissemination Forums.

When asked what was most stressful about the linker role for her, the linking agent replied that there were two types of stress: (1) at times she felt isolated, not a part of either the agency or the sites, and (2) she was tense during the transitions between stages of her work, when her role had to change as a result of moving into a new phase.

She noted that "this was one of the best jobs in the agency, because I had autonomy in my work, independence in determining my role. Having full rein was confidence producing." At the same time, though, she points out that "this kind of field position carries no power. It's really a steppingstone to a higher-level job."

GENERAL OBSERVATIONS

Several observations of a general nature emerge from a reading of the three linking agent studies regarding goals, site selection, entry, problem identification, program selection, training and implementation, and disengagement.

●●● Goals: The linkers' goals were roughly similar, and were no doubt based on their understanding of the aims originally presented in the proposal as well as subsequent restatements throughout the project. Of the three goals, the first two were more or less achieved; that is, schools did select R&D programs that seemed to match their needs, and school improvement (or change) did appear to take place, if evidenced by nothing more than the introduction of a new program into the total curriculum.

The third goal, that of building some sort of problem-solving capacity at the school site level, is more elusive. Its achievement is hard to discern, partly because the goal is not stated in such a way as to be measureable (how does one know if "it" has been reached when "it" is a nebulous ideal?) and partly because its rightful place as a goal for Consortium linkers is rather questionable. The proposal did not list it as a goal, and the Consortium Project Director did not regard it as such either (he was content with linkers simply using the problem-solving process with school people, not necessarily teaching it to them). However, in the Consortium's response to questions raised by NIE personnel reading the proposal (April 1976), it is clearly stated that linkers' effectiveness will depend, in part, on their ability to help sites in "the development of an ongoing capacity to identify and solve problems" (page 23).

Thus, there appears to be some ambiguity about the capacity-building goal at the Consortium Central level, so the goal's emergence and survival in the minds of these linkers is perhaps not too puzzling. The goal's diffuseness may also account for its weak treatment and subsequent question of whether or not it had been met. Discussion by linkers on its achievement ranged from surprise that school people could recount the steps of the problem-solving model, to descriptions of their "clear sense" of the process, to projections that "at least one of my sites will use it again on their own."

●●● Site selection: It appears that five out of the six school sites selected for participation in the Consortium and discussed in these studies did not have serious reading problems

(Cramer/Morse excepted). This casts some doubt on a selection process that relies for the most part on schools' "checking off reading" as an area needing attention. It may be that reading was a less important criterion than schools' previous relations with the agencies, geographic and/or demographic factors, or agencies' desire to expand by working with a new district. The meaningfulness of an extremely general needs assessment that only identifies "reading" as a need is questionable, and may be a function of schools' cursory approach to filling out an agency questionnaire rather than a considered appraisal of students' real needs. One ramification of this means of site selection is a later pressure to verify such a need by actually coming up with a real reading problem, which was not possible at the Hartfield site.

●●● Entry: Handling of this phase was carried out commendably by all of the linkers. They proceeded with awareness of the whole setting (district) and caution (covering all necessary bases). Their surefootedness continued with time and is especially evident in the many examples of their use of "political" skills* such as: (1) cooptation--the Consortium linker "coopts" the internal linker and wins his approval and support for the Consortium project; (2) buffering--linkers provide needed cushioning between the principal and assistant principal, between the principal and teachers, between building and district personnel; (3) bargaining--the linker successfully negotiates for a suitable district financial commitment with the superintendent. The only political skill for which no example readily comes to mind is that of circumvention, or going around the rules to get what is needed. It may well be the case that external linkers can't accomplish circumventive moves because they don't know the system well enough to go around the rules.

●●● Problem identification: There seems to be a tendency among the linking agents to accept school personnel's problem as stated and to get on with finding the solution. In other words, there's little questioning or probing of the sort that might result in a more specific or "truer" problem statement. It's certainly easier to take people at their word, rather than to explore problem possibilities, and this mode fits in with the practice of state facilitators, who deal with many clients and tend to honor their experience and ability to pinpoint troubles. However, a problem-finding process would

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* For a detailed discussion of political skills, see Taylor, Beverly Loy, Mapping New Schools, Part 3: Mapping Your School's Environment. New York: Center for Policy Research, 1978, pp. 97-109.

have served the Consortium problem identification phase well. There was enough time to do it nicely too. Said one linker:

> How do you know when the problem's identified? I couldn't figure it out. We just did it [problem-finding activities] for awhile, and figured it was enough....I still don't really know.

This problem of identifying the problem was heightened by the fact that the groups were limited to discovering a reading problem, and as noted earlier, this may have forced them to find one, possibly where none existed. Indeed, in the case of one school site, the problem eventually identified was not one of reading at all, but of teacher isolation, for which the "solution" had to be the introduction of a new reading program. The side effects of introducing a new program are, of course, exposure to other people: trainers, developers, demonstration site users, and so on.

In addition, this phase, being an unpopular, unfamiliar, and time-consuming one for school personnel, suggests the possibility that the linking agents themselves were just as anxious to get through it, so they could give up battles with school people to attend to it.

●●● Program selection: This phase appears to have suffered from the same sort of potential for expedient treatment as did the problem identification stage. It is "understood" that the solution to the identified problem must be selected from the R&D product pool, and even though one linker assured school people that if nothing in the pool was "right," they could choose nothing, it was also clear from the administrator that they'd better find something there rather than risk losing the Consortium project in the school.

Thus, the pluses of limiting the project to reading and to R&D outcomes (the linkers don't have to search the universe for resources, and a strong linkage system is already in place to provide resource information and materials) are somewhat undone by the minuses of requiring the problem to be a reading one and of pressuring participants to find their answers in the R&D product pool. All linking agents mentioned this as a constraint on them and on the multi-constituent groups.

●●● Training and implementation: Training and follow-up training were, for the most part, carried out well, with linkers providing for adequate resource-user connections. Implementation activities, however, varied from very little intervention to close tracking and timely help when needed. Differences probably derive from varying role interpretations: on the

one hand, linkers not seeing roles for themselves and experiencing a certain detachment from implementers (the Midwest linkers); and on the other, experimenting with the role and feeling involvement with the whole linkage process from entry to disengagement (the Northeast and North Central linkers).

Evaluation planning was decidedly weak, with the exception of the Northeast linker, who aided school people in designing and operationalizing an evaluation plan, though with varying success from site to site in regard to assuring it a regular place in the program. Another linker, by contrast, who took no action with evaluation planning, instead blamed Consortium Central for not providing assistance and initiated no efforts beyond complaining to the Project Director (Midwest linker).

●●● Disengagement: The treatment of this phase varied considerably. At some sites the process of withdrawal began rather promptly once implementation was under way, so that linker contacts consisted mostly of maintenance activity and a shift to management concerns (Midwest linker). Other sites received close attention to their implementation difficulties rather consistently throughout the Consortium project (North Central linker). Still others were aided in diffusion and dissemination activities, beyond their needs for implementation help, as a means of transferring responsibility from the linking agent to the school people (Northeast linker).

The final leave-taking was marked by varying degrees of intensity, ranging from the "big bang" state-wide conference as a send-off (Midwest linkers), through the middle range of a final report summary to administrators on the project (Northeast linker), to the low-key letter to faculty members that marked the end of the project and redirected them to state facilitators for further agency assistance (North Central linker).

In the first case, there is a nice balance achieved with the means chosen by the Midwest linker to initiate the project in 1976: the joining-up conference. Hellos and goodbyes were firmly stated. The second and third cases lack the thunder that might be appropriate for concluding a relatively intensive, three-year relationship with school sites.

In general, the milestones from which the five phases were derived seemed to provide a sound base from which linking agents could operate. Yet there was enough room for experimentation and interpretation of the linking agent role for linkers' own "variations on a theme" to be possible. The Consortium Project Director, noting the special nature of the long-term, intensive Consortium linking agent role, and the ways in which the milestone phase

activities were carried out, said: "The Consortium project demonstrates that outsiders can work successfully with insiders."

Much energy and good spirit seemed to accompany linkers' efforts, and one supervisor said to the researcher:

> I hope you communicate some of the extraordinary enthusiasm that has gone into the Consortium project. Everyone was always glad to see each other again at Consortium meetings, no matter how busy they were back home. I don't think there was ever any "linker burn-out" among them.

In that vein, then, it is hoped that these studies in Part III have not only captured the energy and enthusiasm of the Consortium participants, but have also presented them in a tableau vivant, rather than in a still life.

PART IV: REFLECTIONS ON THE CONSORTIUM LINKING AGENT ROLE

On a continuum marking extensiveness of involvement, the Consortium linking agent role would go beyond the linker-as-resource-connector, and past the state facilitator notion of resource awareness and selection assistance. But it would fall short of a district-wide consultancy role, such as might be fulfilled by an organization development specialist. It might be said that the Consortium linking agent role is a composite of the linker (narrowly defined) and the consultant functions that focus on intervention at the school building level. Consortium linking agent activity is typified by:

- Use of a face-to-face intervention strategy
- A long-term relationship with sites that continues <u>through</u> the implementation stage
- Intensive work with four sites per linker
- Participation in establishing a multi-constituent problem-solving group
- Focus on a single curriculum area, that of reading
- Linker centrality vis-a-vis the multi-constituent group, the school principal, and school district personnel
- A generalist, rather than a content-specific, set of skills
- Use of a rational problem-solving process
- Access to material and human resources via a substantial linkage system
- Use of a budget for consultants, travel, materials, training, released time for teachers
- Limitation to examining and selecting from a pool of 40 R&D reading programs, all approved by the Joint Dissemination Review Panel
- Sharing with an agency supervisor, a home base "partner" in the enterprise
- Value on <u>quality</u> of linkage service, rather than quantity of program adoptions
- Extensive documentation of linkage work

- Participation in the research component involved in studying linkers' work
- Experimentation with the linking agent role

IT IS AN "INSIDE" OUTSIDER ROLE

The three studies presented in Part III comprise a profile of the Consortium linker as an "inside" outsider. This "inside" outsider gets inside the school system by virtue of long-term and regular exposure to it and its inhabitants, by becoming a familiar face, a known and trusted quantity, and a valuable source of information. But the Consortium linking agent remains outside of the system by maintaining a "welcomed" visitor status, an unbiased perspective, and independence.

Many writers have reflected on the various advantages and disadvantages of external agents (e.g., Cotton et al, 1977; Sieber et al, 1972; Baldridge, 1975; Heathers, 1975; and Owens, 1970), and for the most part, they agree on the following notions:

Outsiders can do what insiders may not or cannot.

- Bring fresh perspectives
- Raise questions and challenge assumptions
- See the whole picture
- Remain apart from internal politics
- Be objective and be viewed by insiders as objective
- Access outside resources readily
- Operate more freely and independently

Outsiders may not be able to do what insiders can.

- Understand the dynamics of the local setting
- Possess enough authority to get things done
- Care enough about the system's needs and goals
- Avoid becoming a pawn in district politics

The extent to which Consortium linkers were able to design their roles so as to provide "inside" views from their outside positions permitted them to take full advantage of both sides, so to speak.

Sometimes, however, the line between inside and outside gets fuzzy, or perhaps more accurately, is viewed differently by various participants. An example of this perceptual difference was seen in the Northeast case, in which by the third year, the principal no longer viewed the Consortium linker as an outsider. "You're seen as part of the group," he said, although the linking agent did not feel that that was true.

Another difficulty encountered by Consortium linkers was that many site people didn't know how to utilize this new "inside" outsider. Said one linker:

> The people at that site just didn't know what to do with me. They were used to having other teachers come in to do a demonstration, and they knew how to work with a union negotiator who came around from time to time. But they couldn't get a handle on how to use me on a regular basis after that first year.

From this statement, one might say that Consortium linkers were not only teaching a problem-solving process by example, but were also teaching site people about a new role that focused on the whole process of school improvement.

●●● The inside-outside risk: An imbalance of inside and outside standing--too far inside so as no longer to be viewed as objective, or, alternately, so far outside as to be regarded as trivial.

●●● The inside-outside payoff: Operating "on the line" is enjoyed by a trusted outsider with sufficient inside knowledge.

IT IS A DESIGNABLE ROLE

The Consortium linking agent role was by no means predetermined or "set in concrete"; rather, it was viewed as an appropriate role for experimentation. No job description existed; and while the role for the first year was envisioned in terms of the problem-solving process steps, the second and third years were decidedly open for individual interpretation. The 16 milestones, developed jointly by Consortium Central staff and the linkers, put some meat on the bones of the workscope by adding a few of the "whats," but none of the "hows." So how did linkers decide what to do? There were four major types of input to their role formulations:

- Consortium Central sketched the outline of the role by determining the goals, number of sites per linker, level of intensity, time period, resource pool, budget, and some tasks (such as documentation requirements). This broad-stroke sketch was delivered via the proposal, the

joining-up conference, and the first training workshop. While Consortium Central staff members had some strong ideas about the role of the Consortium linker, these notions were mediated by their desire to acknowledge the individual approaches and ideologies of the linkers and their agencies, to balance their time-honored methods with their own desires for experimentation. This balance didn't always work out; and as Consortium Central became more assertive in stating its views, these figurative "raids" into the land of the linkers were often spurned by cries of "leave us alone, we know what we're doing!" There was enough of a sense of competition among the agencies to resent any laying on of demands, though indeed, authority did rest with Consortium Central, the prime contractor. The wish for balancing approaches and the response to Consortium Central dicta led to a "hands off" policy, and some of the notion of role experimentation slipped through people's fingers.

Let it be said, though, that there was experimentation, though maybe not as much as the Project Director would have liked, and it is evident in these three studies. For example, one linker tried a variety of implementation assistance activities; another experimented with intensity of involvement by leaving responsibility for creation of a problem statement to the school group working on its own. And, probably, Consortium Central's hands off policy created the environment that led to some experimentation because linkers were pretty much left to their own devices, became more involved and confident, etc.

- Each agency's mission, stance toward working with schools, agenda, staffing patterns, and so on provided the soil in which the Consortium linking agent role grew, affecting the direction in which it leaned. To what extent the linker role was designed and to what extent it was simply taken out of the agency closet and altered for a better fit is not wholly clear. For example, the North Central linker's role is quite congruent with the agency's client-centered, problem-solving, caring approach. And both Midwest linkers actively resisted even modest intervention at their sites during implementation, which was consistent with their agency's general practice, and contrary to Consortium Central's expectations.

- Linkers themselves shaped the Consortium linking agent role to fit with their own skills, background experiences, styles of working, psychological needs, and energy levels. All of these factors led to the determination of what felt "right," plus whatever mix there was of their own learning agendas, curiosities, career advancement interests, professional development ideas, and so on. A linker feeling the need to get grounded, to go slowly, etc. would no doubt take a more cautious approach to designing the linking agent role

than might one who wanted to practice a lot of leadership skills. Or, on another tack, the linker who is well versed in, say, group process skills might do less experimentation in that area than might a linker who is still learning them or in need of practicing them.

- The sites to a great degree influenced the design of the role by their view of the linking agent role, their responses to the linker as a person and as a professional, their situational constraints, even their motivation for participating in the Consortium project. The role a single linker plays varies across sites, as can be seen in the studies. For instance, Midwest linking agent B served as a planning management consultant to the principal at one site and at the other, an intervener between the superintendent/principal and the teachers.

●●● The design risk: An inflation-deflation problem--the too-big role leads to linker burn-out, and the too-little or too-same role causes linker boredom.

●●● The design payoff: The custom-designed role has enough "give" in it to be challenging, yet enough "fit" for comfort and support.

IT IS A ROLE WITH INHERENT STRESS DOMAINS

The Consortium linking agent role abounds with opportunities for autonomy, challenge, rewards, job satisfaction, and the chance to learn new skills and to try new things. One might take a more sobering view of the flip sides of these opportunities: that is, autonomy shades into loneliness, challenge merges with frustration, learning new things may feel more like uncertainty. There are certain stress domains that are inherent to a role like that of the Consortium linker, and it may well take a certain type of individual to thrive in it.

A personal qualities profile of a good linking agent (e.g., by Sieber et al, 1972; Crandall, 1977) outlines the following types of characteristics:

- Non-authoritarianism
- Patience
- Tolerance for delay and frustration
- Low ego gratification needs

- Good communication abilities
- Self-directedness, autonomous
- Adaptability to different people and situations
- Utilization of multiple role relationships for goal achievement
- Capacity for energizing others
- Risk taking
- Orderliness
- Enjoyment of work with variety of people
- Enterprise in assessing and exploiting situations for goal achievement

One could add other qualities, such as:

- Open-mindedness
- Tolerance for ambiguity and uncertainty
- Self-reliance
- Awareness of self vis-a-vis clients
- Flexibility, rapid shifting from one situation to next
- Persistence
- Eagerness to learn, curiosity

A profusion of as many of these characteristics as is humanly possible will ready the linking agent for managing the inevitable stresses of the linker role.

THE MARGINALITY STRESS DOMAIN. The role is socially isolating, as has been noted by Havelock (1969) and every writer on linking agentry since then. Standing between the agency and the school system, the linking agent is peripheral to each in terms of main activities, influence, getting feedback, rewards, feeling included. Owens (1970) describes the value of remaining outside of the system, or power structure, by pointing out that the linker is "privileged to raise questions, to suggest procedures, and to generally facilitate the operations of the group more candidly and objectively than...an insider." Crandall (1977) notes the importance of maintaining a stance of "functional neutrality" if linkers are to have impact upon the system and serve the long-term interests of the relationship.

The level of discomfort experienced by linkers depends upon their predispositions for belonging to a group, or alternately, distancing from a group. For some, there may be minimal stress associated with a boundary-spanning role; others may experience much insecurity and disconnectedness. One's linkage philosophy has an effect too: the linker functioning more as a broker of resources than as a longer-term problem-solving consultant may never experience the marginality stress because s/he never gets in far enough to feel "outside" of it. A linker having a more close-up, intensive involvement may have to fight off such marginality-reducing efforts as "identifying" with the principal or the teachers, attempts that could overcome feelings of isolation or outsiderness but also compromise the linker's objectivity and non-alignment within the client system.

The obvious source for getting nourishment, a sense of legitimacy and credibility, and recognition is the linker's home base: the agency. Close connection with the agency provides collegiality, resources, and supports, help when needed, rewards when deserved. But for the linking agent, particularly the one-of-a-kind Consortium variety, this may not be so easy. The Consortium linking role was not well understood, or appreciated, by other agency personnel, leading the North Central linking agent, for example, to feel some frustration by other staff's view of her job as a "luxury." Said another linker:

> I try to keep a certain distance, continually. Everywhere. But sometimes I feel outside of everything, not just the sites, but my own agency too. I'm doing different things, people don't quite understand what I do, so it's almost as though I'm outside of the agency, looking in.*

The point of linker disaffection correlates with a decline in job satisfaction, and hence performance. Nearly everyone feels some need at some time for recognition, support, and belonging. If it is not satisfied outside of the client system, then chances are that in the grips of a strong enough need, the linker will attempt to meet it inside the school system. This can have negative consequences, as noted previously. How did Consortium linking agents meet these needs?

A strong support system appears to be one key. Consortium Central anticipated marginality stress and created a substantial linkage system to offset its effects. Thus, the Consortium meetings every six months and the circuit rides served a dual purpose: they not only kept the Consortium Central staff in touch with linker life,

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* The Project Director noted that many of the Consortium agencies had several state facilitators in house and, pointing out that numbers establish norms, suggested that marginality stress might be felt by a state facilitator alone among four or five Consortium-type linkers.

but they also strengthened the ties among linkers, supervisors, and Consortium Central staff. One linker noted that she always called other linking agents more often after a Consortium meeting. The notion of hiring linkers from within the agencies carried with it the implication (and hope) that they would already have informal support systems and relationships in place at their home bases. The feature of a partner at the agency, the linker's supervisor, who worked 20 percent on the Consortium, was specifically designed as a support for the linking agent. The 16 milestones served a support function by providing a cloak of security for the linker ("I have a good idea of what I have to do") and by lending legitimacy to their work.

Of course, for a linkage system to be effective it must be used, and in the three studies there is evidence of rather uneven utilization of its resources, ranging from active (the North Central linker) to relatively spare. What emerges, though, is linkers' reliance on the linkage system when they needed it, from such comments as:

> It was really important to be able to call him [the Linker Support Specialist] when I got back from a site visit. He knew what I had to deal with out there.
>
> My supervisor probably gave me more than 20 percent of her time. She was a great help and there when I really needed her.
>
> I could always sit down with somebody at the agency and thrash things out until I came away with a lot of good options.

Furthermore, all of the linkers studied seemed to maintain and build their support bases at their agencies. They reported progress on the Consortium work in staff meetings, they engaged in problem-solving sessions on their own and others' projects, they invited others to participate in workshops and conferences--all of which kept them visible within the agency and served to enhance their images as well.

●●● The marginality stress: The loneliness of the long-distance linker theme.

●●● The marginality remedy: Design and proactive use of a strong linkage system of resources and supports.

THE ROLE NOVELTY STRESS DOMAIN. It has been said that linking agents are "participants in the invention of new roles" (Butler and Paisley, 1978), and this is especially true of the Consortium linkers. While the milestones provided some parameters to the new role, linkers had a good deal of discretion in detailing it. This freedom proved to be problematic in several ways. First, the degree of freedom was rather vague: Consortium Central had

role experimentation on its agenda, but it also had acknowledgement of agency expertise in mind; the balance wasn't always clear. The effect of this lack of clarity upon linkers was to heighten uncertainty. They implicitly knew that they were designing their own roles, but they also knew they were responsible to Consortium Central as prime contractor, which was "judging" their performances in some unknown way according to some unveiled criteria. What did the "right" role formulation look like? They were also responsible to their agencies and to their sites, which further complicated matters. Goals were rather diffuse too, fuzzily articulated, and hard to measure; although by the end of the project all linkers stated roughly the same goals which had guided their work, assessing whether or not they had been achieved remained difficult.

Second, there was an unwillingness to admit the lack of needed skills (for example, in conducting state-wide conferences, or creating an implementation plan) that was compounded by the relative freedom -- "we should know how to do this; it's hard to admit to needing help." Doing something new requires extra energy and a certain amount of fearlessness, or at least willingness to bumble from time to time, and always, the decision, made over and over, to experiment, to put oneself on the line. It has to be worth the effort.

The incentives for experimentation in the Consortium were overshadowed by forces pushing in the other direction: there was no strong push from Consortium Central for experimentation, just gentle nudges; job security did not depend upon innovativeness; the role was inherently different to school people, who had to get used to it, and who probably wanted to curb any tendencies toward the unusual; there appeared to be minimal agency support for role experimentation, though this was no doubt ambiguous too.

In the face of uncertainty, ambiguity, even insecurity, the tendency is strong to rely on past experience, to avoid risks, to lean in the direction of familiar, tried ways. "The old way is the best way" usually will win out, although the pressure to experiment and to be creative will persist because the expectation and the possibility remain. Reliance on past practice, and sometimes simply ignoring whatever gives rise to uncertainty, are perhaps "solutions" to role novelty stress.

More ambitious is the route chosen by the Northeast linker (role negotiation with school site people) and active exploration of implementation and diffusion activities, a key impetus for which was the fact that she worked 100 percent on the project and had time for experimentation. Thus, she first worked on achieving some satisfactory role clarity and then invested energy in exploration. A third approach, that of actively using people and resources to aid in developing role clarity and reducing uncertainty, was used by the North Central linking agent. She relied

on a re-education strategy to provide herself with the needed tools (and security) for role experimentation. These last two responses are characterized by a tendency toward proactiveness and learning of something new.

- The novelty stress: Uncertainty, ambiguity, fuzziness, mixed messages, insecurity, and the ultimate question, "what am I supposed to do?"

- The novelty remedy: Investment of energy (fairly persistently) in exploration, re-education, and attempts toward role clarity, plus a generous dose of laughter and proper appreciation of an opportunity that doesn't present itself too often.

THE ROLE COMPLEXITY STRESS DOMAIN. The linking agent role, particularly a long-term one such as the Consortium, is actually a collage of a variety of different roles (see Part II for discussion of the several types), which the role inhabitant is expected to have mastered. Thus, the linking agent must be expert in many realms and have the ability to shift from one to another as needed. Success depends on such flexibility (Sieber et al, 1972) as well as actual competence in carrying out each role. And often, to gain acceptability in the system, linkers will sometimes take on more than they can handle, which increases their already considerable burden and leads to over-extension and fatigue. These three factors (role variety, flexibility, and overload) create role complexity stress, to which even experienced linkers are susceptible.

The design of the Consortium project limited this stress domain, to a certain extent, by prescribing the area of need (reading) so that linkers didn't enter a school site "blindfolded," and by mandating that programs be selected from a pool of 40 R&D products, thus narrowing the "universe of alternatives" and thereby reducing the amount of linker time spent in hunting and assembling resources. A further aid was the availability of the Resource/Data Management Coordinator, whose function was to provide requested resources. These helps freed linkers for mastering their various roles and allowed them something of an opportunity to "watch" themselves in action. Nonetheless, role changing, like gear shifting with five on the floor, isn't easy at first. And the complex role relationships required of linkers with agency, Consortium Central, and site personnel added to the general overload.

Needless to say, some role changes were easier for different linkers at different points during the project. For example, the North Central linking agent appeared to have little trouble shifting to a technical assister mode during implementation,

whereas the Northeast linker struggled for awhile before she "got into gear." A possible explanation is that the former has an extensive teaching background, probably knew what teachers needed for implementing a new program, and more or less "naturally" provided appropriate help. The Northeast linker found herself face to face with an unfamiliar situation and had to learn it before effecting a switch.

Typical responses to a sense of uncompromising overload and complexity include: (1) a tendency to lock up, reject help that might be viewed as complicating life even more, turn more and more to self-reliance and closing off; (2) over-involvement in familiar and comfortable functions, sometimes taking the form of identifying with roles of particular clients, e.g., acting somewhat like the school principal, or sympathizing with teachers, as a means of denying the existence of less-favored linking agent role components; (3) under-involvement or lack of recognition of particular role functions because they're foreign, uncomfortable, time consuming, enervating, etc. When carried to the extreme, these responses become dysfunctional.

What are some ways of combatting this stress? Sieber et al (1972) suggest several:

- Make use of opinion leaders and self-starters at sites
- Get others to participate in discussions
- Delegate responsibilities
- Use a systematic record-keeping method to keep track of things

Other possibilities can be added:

- Develop a clear sense of the role and don't take on more than is possible
- Ask for help when needed, which implies awareness of trouble areas
- Prioritize tasks
- Keep in mind the compensations of a complex role (career advancement, contact with variety of people, stimulation, and so on)

One Consortium linker put a great deal of energy into developing her "key contact people" at all of her sites. They not only carried out much of the logistical work that was required, but also provided her with valuable feedback on her performance, information on site events when she was absent, and support within the group and the larger school setting.

●●● The complexity stress: Overload, confusion, fear, and burn-out.

●●● The complexity remedy: Clarity, delegation, sharing, and resource utilization.

There are, unfortunately, other stress domains waiting in the wings for ambitious linking roles like the Consortium's. These three--marginality, novelty, and complexity--were the most relevant, the most striking, and the most felt to Consortium linking agents.

AFTERIMAGES OF THE CONSORTIUM LINKING AGENT ROLE

Looking at the Consortium linking agents, their activities, their settings, and their socialization into a new role has left the following afterimages, presented in random order within two categories: linker role-specific and linkage system-specific. There is some overlap, some faint dissolving from one category to the other, making sharp silhouettes a blurred impossibility. Some positives and some negatives are included.

LINKER ROLE-SPECIFIC AFTERIMAGES. These are as follows:

- Linkers who perceived themselves as learning the linker role seemed to engage in more role exploration and experimentation, to get more involved in the work and with their clients, and to derive more job satisfaction.
- Linker performance varied from prior experiences to the extent that the role was perceived as new and different, and so more experimentation resulted. Those linkers who didn't view the role as different tended to see it in terms of its constraints, not its possibilities, and failed to take advantage of the opportunity to experiment with it.
- Linker use of resources seemed to be related to the perception of the role as novel. The more unfamiliar the role, the heavier the utilization of resources.
- Interpretation of the linker role was determined to a great extent on the basis of agency history and ideology, and linker background and experience.
- This linker role was novel to sites too, and will be for some time to come. The future of the role depends, in part, on school people's ability to utilize it and on the linker's patience in teaching it to them.

- This linker role is special: not everyone can or should try to fill it. It requires, among other things, tolerance for ambiguity, the ability to get people to do things when one has no authority, and a facility for living on the boundaries of organizations.

- Linkers function better when they maintain self-awareness vis-a-vis school people and their sites. One must observe oneself in action.

- Linkers can benefit from negotiating their roles with clients, or at the very least, designing their roles consciously. They should be explicit about the role, what they can and can't do, and establish what clients want and need as well. Drifting into a role is not advised. "Changing horses mid-stream" (renegotiating the role) is advised, when necessary.

- Linkers ought to be proactive in seeking and utilizing resources, not only for their clients but for themselves. Knowing the value of a strong support system--and using it--will minimize the marginality and isolation that will be experienced from time to time. It also marks the linker as one who practices what is preached.

- Linkers should focus on learning to be good managers of resources and human workpower. They shouldn't try to do everything themselves but should interpret the term "linker" as a straight connecting or brokering function, sometimes.

- The identification and utilization of a "key contact person" at each site will help enormously with coordination and workload.

- Linkers would do well to begin with a clear linkage strategy--knowledge of linkage processes, their own and others' roles, subject matter, likely aids, and barriers to be encountered--and expect to tinker with it as time passes and conditions change.

LINKAGE SYSTEM-SPECIFIC AFTERIMAGES. Included here are:

- The linkage system of resources need not be confined to the system. Provisions and encouragement for going outside the network should be offered.

- Consortium Central's stance in relation to the three stress domains was:

  --Marginality -- Expected, and mechanisms established to limit its effects, to take the frost off isolation

--Novelty -- Hoped for, but little effort to encourage role experimentation and to reinforce or even to share new learnings

--Complexity -- Expected, and mechanism (training) established to limit its negative effects

- The fact that linker performance evaluation was left to agency supervisors may have been one factor in the lessened attention given to role experimentation. This experimentation was a Consortium Central agenda, not necessarily shared by the other agencies; so linkers may not have been valued for their innovativeness.

- The linkage strategy for educational improvement is quite workable. Linkers as knowledgeable "inside" outsiders can help with immediate concerns of the client and begin to develop a home-based problem-solving capacity. Though some believe that only third-party consultants can help, others feel that much groundwork can be laid by external agents working closely with school personnel and that one long-term benefit is leaving behind a capacity for problem solving other issues.

- A strong support system is essential for linkers--to provide ego rewards, satisfaction, connectedness, and to overcome marginality, isolation, and frustration resulting from role complexity. But another important purpose is to provide a means for sharing individual learnings and insights. Isolation negatively affects linkers and also the whole field of linkage by not increasing the levels of understanding of the linking agent role. Isolation is poor linkage.

- Linkage systems might experiment with using linkers trained in different fields (such as organization development, social psychology, curriculum and instruction), test their usefulness vis-a-vis different types of school district clients, investigate the relative advantages and disadvantages of varying linking styles (such as front-end brokering, total immersion, classical OD, heavy implementation focus, etc.).

- High-quality, face-to-face intervention does make a difference, and is necessary for bringing together the different worlds of researchers and developers, technical assisters and school practitioners. But high quality of interaction is key; if the linker is not perceived as competent and capable of giving needed assistance, no amount of face-to-face intervention will help.

- A widely dispersed linkage system such as the Consortium is a blessing and a bane, an aid and a barrier. The

pluses are cosmopolitanism, being part of something big (psychological and professional benefits), the "true ring" of the voice back East. The minuses are inter-agency competition, linker competition (if not "healthy"), linker responsibility to too many "masters," extreme loyalty to own agency methods and disparagement of other approaches, no matter how effective they are.

- Linker self-diagnosis, involvement in determination of training needs and methods of obtaining such training inside and outside of the linkage system would be valuable.

- The fact that Consortium linkers were affected by many contextual problems (school closing, teacher layoffs, teacher transfers, teacher strikes, inter-program feuds) underscores the importance of linkers having a good grounding in the organizational setting and focusing a portion of their activity on getting the program institutionalized.

- The time period for linker intervention should be flexible, based on site needs, and decreasing from one year to the next.

- If leaving behind a problem-solving capacity is a goal, then steps must be built in to to teach the process, not just use it: workshops for awareness of steps, practice in using them, etc.

The Consortium linking agent role, as designed, seems to be a good one. School districts are permeable, to a degree, to the "right" outsider, who hence gains entry, becomes trusted, shares in planning--in short, becomes an "insider" in a sense, though never completely. These "inside" outsiders know the day-to-day life of the school, understand some of the workings of the district, get invested, help solve problems. But in the end, they can always walk away: they don't "live" there.

APPENDICES

Linker Study Linker Interview Protocol

Linker Study Supervisor Interview Protocol

List of Consortium Milestones

Bibliography

Consortium Project
R&D Utilization

BLTaylor
June 1979

LINKER STUDY INTERVIEWS

Person interviewed _____ Date _____

Role LINKER Sites _____ Interviewer BLT

I'm from the Center for Policy Research in New York and have been asked by Consortium Central to conduct a study of selected linking agents in the Consortium Project. Other studies are being done too, like the case studies and epilogues, and a study of the whole project. My study will focus on the role of the linker: activities carried out, linkers' background, supports available to linkers, and so on. I've read your contact reports for the _____ and _____ sites, but there are some gaps that I need to fill. Do you have any questions before we start?

LINKER BACKGROUND AND SKILLS

I'd like to start by getting a sense of you and the experiences you brought to your work as a linker.

1. What is your background -- education, prior training, work experience?

2. As you think about the skills needed to carry out the functions of the linker role, in what areas would you say your strengths lie?

3. In what areas did you feel you needed some help? Did you seek help? Where, how, with what results?

4. How might you characterize your style of working at the _____ site on the following scale? (10 = proactive)

10	5	0
Proactive	Neutral	Reactive

More...

ROLE OF LINKER

5. How would you define the role of linker in the Consortium Project?

6. Did you see yourself as controlling or directing the multi-constituent group and its activities?

   (If so,) in what ways?

   (If so,) did that change from Year One to Year Two to Year Three?

7. What was your role in decision making at the sites?

8. Did you ever feel outside of the main activity flow at the sites?

   (If so,) did you try to change that, and how? With what success?

LINKER ACTIVITIES

9. What would you say were the major goals of your work as a linker in the Consortium Project?

10. What interest, if any, did you have in improving the problem-solving skills of site people, i.e., leaving a process behind that they could use to solve other problems?

11. Did you make active use of the milestones? How?

12. How much time do you estimate was spent in documentation work? (Years One, Two, Three)

13. How did your role change from Year One to Year Two to Year Three? Did you engineer the changes or react on the spot, as needed?

14. What was the biggest problem you faced at each site? How was it resolved?

More...

15. What state-wide conferences did you plan and conduct? (Dates, main focuses, participation of site people, effectiveness)

16. What did you need to know in order to fulfill the linker role?

SUPPORTS AND CONSTRAINTS

17. Which of the following supports did you find helpful? Less helpful?

    a. Linker meetings (training and sharing sessions)
    b. Consortium contact person(s)
    c. Agency supervisor
    d. Other linkers
    e. Consortium circuit rides
    f. Other: (name) _____

18. How useful were the following? What uses did you make of them? How effective were they? How might they be improved?

    a. Tool Kit
    b. Linkerland News
    c. In Process
    d. Your contact reports
    e. Critical Incident trios
    f. Proposal
    h. Other: (name) _____

19. What constraints did you feel were placed on you by:

    a. Your agency
    b. Your sites
    c. Yourself
    d. Consortium Central
    e. Other: (name) _____

20. Were you able to lessen their effects? How?

More...

LINKER NETWORK

21. To what extent did you consider yourself part of a network of linkers in the Consortium Project?

22. How did you use that network?

23. How did the network help you in your linker role?

24. How did it hinder you?

ENTRY INTO SITES

So far we've been talking about the linker's role, activities, and supports and constraints. I'd like to switch to what happened when you first started the project.

25. On what basis were your sites chosen?

26. What was your role in site selection?

27. What assumptions, if any, did you have about the _____ site and people at the outset of the project? Did they change over time? How, and why?

28. How did you plan and achieve entry into each site? Describe your first contact (with principal, with teachers).

29. What guidance did you give principals in selecting members of the multi-constituent group?

30. On the following continuum, where might you place the principal, then the faculty, of the _____ site at the beginning of the project? The end? What might account for differences? (10 = very supportive)

10		0
Very supportive		Unsupportive

More...

DISENGAGEMENT

Shifting gears again, let's look at what's been happening recently.

31. Your contact reports stop at _____ 1979. What's been happening since then at the _____ site?

32. Where are you in the process of withdrawing from each site?

33. Are you putting any mechanisms in place to assure ongoing program renewal (e.g., a review team, regular follow-up)?

34. What does disengagement mean to you?
To each site?

35. What work, if any, remains to be done at each site?

LINKER EFFECTS

36. What would you say were the major effects of your linkage work on:

a. The sites
b. Your agency
c. You

37. What might facilitate (inhibit) a linker's effectiveness?

38. What advice might you give to a new linker?

OTHER ISSUES

39. Do you have any other comments to make on these or different topics?

More...

40. Are there any materials (copies of reports, brochures, etc.) that could help me understand your agency or your ideas about linkage work?

You've given me a lot of your time. I appreciate that and the insights you've provided. Thank you!

INTERVIEWER'S COMMENTS

Stop.

Consortium Project
R&D Utilization

BLTaylor
June 1979

LINKER STUDY INTERVIEWS

Person interviewed _____ Date _____

Role SUPERVISOR Sites _____ Interviewer BLT

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THE LINKER's ROLE

I'd like to have a sense of how you, as supervisor, view the role of the linker in the Consortium Project.

1. What would you say is the main function of the Consortium linker?

2. What skills do you regard as particularly important for this role?

3. How, if at all, does the application of these skills change from Year One to Two to Three?

4. How might you differentiate the role of the Consortium linker from that of a state facilitator in the National Diffusion Network?

5. In your opinion, how adequate was the Consortium support system? (Probe for training, personnel, materials.)

More...

THE SUPERVISOR'S ROLE

Let's shift to your role as _____'s supervisor.

6. When did you assume your duties as the linking supervisor? (If not at outset of project, history of what came before, if possible.)

7. What percentage of your time did you devote to Consortium work?

8. As a supervisor, what did you view as your functions in the Consortium? (Probe for support, review, monitor, consult, etc.)

9. How often did you meet with _____? (Probe for regularly scheduled, or on-the-spot meetings.)
   Did this frequency change from Year One to Year Two to Year Three? Why?

10. What was the focus of these meetings?

11. What help do you think you provided to _____ as her supervisor?

12. What did you regard as _____'s particular strengths as a linker? Her weaknesses?

13. What problems, if any, did you encounter in working together? (Probe for scheduling, role perception differences, etc.)

14. What help did Consortium Central provide in defining your role as a supervisor?

More...

15. Did supervisors get together at Consortium meetings to discuss issues in working with Consortium linkers? With what results?

16. To what extent do you think Consortium supervisor meetings focused on ways of working with linkers would have helped in your role?

THE AGENCY'S ROLE

I'd like to turn to _____ as an agency and as a setting for the linker.

17. Briefly, what is the primary mission of _____?

18. What would you say are the agency's major strengths?

19. How do you think the agency might have influenced the way in which _____ interacted with her sites? (positive, negative)

20. What effects of the linker's Consortium work might you see in the way the agency relates to those particular sites or other sites?

21. Has the linker's Consortium work had any effects upon the way in which the agency functions? (Probe for structural changes, new roles, communication patterns, etc.)

22. Do you see any particular changes in the linker herself that might be a result of her involvement with the Consortium Project?

More...

OTHER ISSUES

23. Do you have any other comments to make on these or different topics relating to the linker and her setting?

24. Are there any other people or materials (reports, brochures, etc.) that would help me understand your agency and its ideas on working with schools?

You've given me a lot of your time. I appreciate that and the insights you've offered. Thank you!

INTERVIEWER'S COMMENTS

Stop.

LIST OF CONSORTIUM MILESTONES

1. Identify a single school building within a participating district as the target for linking agent activities.

2. Conduct individual interviews with up to 12 staff members of the participating school.

3. Constitute a multi-constituent group representative of a cross-section of the school community. The group's charge is to participate in a group problem-solving process, beginning with problem identification and leading to the development of an implementation plan for an R&D outcome.

4. Help the multi-constituent group define and document a problem in the area of reading for which the school needs help.

5. Help the multi-constituent group establish criteria for selecting an R&D outcome to help solve the problem identified in #4.

6. Help the multi-constitutent group select an R&D outcome to help solve their problem in reading.

7. Help the multi-constituent group complete an implementation plan for the new program.

8. Insure the design and delivery of teacher training appropriate to the new program selected.

9. Insure that teachers initiate a trial period with the new program (6-8 weeks).

10. Help the multi-constituent group review the trial period, evaluate the results, decide upon next steps, and revise the implementation plan.

11. Help the multi-constituent group and school staff begin a full-scale adoption of the program.

12. Help the multi-constituent group develop a long-range evaluation and monitoring system.

13. Conduct a state-wide networking conference for participating schools during implementation.

14. Conduct a second state-wide networking conference during implementation.

15. Design and conduct a "one year later" multi-constituent group implementation review and recharge session.

16. Terminate linking agent's direct involvement with the site.

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The Consortium Report Series (continued from inside front cover)

The Consortium Report Series (see Box) synthesizes the conclusions and hunches from what has been a rather ambitious undertaking:

- thirty schools experimenting with group problem solving
- thirty schools implementing curriculum improvements under the scrutiny of linking agents and outside researchers
- six linking agents developing as they went a role heretofore idealized but not too well specified.

Publications in the Consortium Report Series

Case Studies in Program Improvement

Over the life of the project, The Consortium employed external researchers to develop case studies of six schools. These cases are published in this volume with an analysis of the common themes that were identified across the six cases.

The "Inside" Outsiders: A Study of Three Consortium Linking Agents

In this publication, studies of three project linking agents analyze their prior experiences, document their work, and explain how Consortium linking agents became an important partner in school improvement.

Reflections on the Experience of Educational Linking Agents

This publication contains observations on a variety of aspects of the linking agent's role, from beginning work with a school or district through problem identification and planning to eventual disengagement. Papers were written by linking agents and their supervisors.

Linking Agent's Tool Kit

The "Tool Kit" is a set of readings and tools that linking agents can use when consulting with schools. It is intended as a resource for linkers, but could be useful for school-based planners who are contemplating working with a linking agent or those who would like to follow a rational problem solving process on their own.

The Consortium Project: A Study of Interorganizational Collaboration

The final report presents a history of the three year project and summarizes learnings about the advantages and disadvantages of temporary linkage systems, effective management and support structures for linkers, and the consequences of conducting a combined research and service project.

The Report Series, like the project, is experimental, some of the reports being prepared by outside research teams, others prepared by the linkers themselves, and still others a blend of the two approaches. All in all, the Series attempts to capture the essence of an experimental project from a variety of perspectives in order to inform and perhaps stimulate others faced with similar conditions.

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Washington State Facilitator Project
Yakima Public Schools
Yakima, Washington

Far West Laboratory for
Educational Research and Development
San Francisco, California

The NETWORK has been promoting growth and change in educational organizations since 1969. All NETWORK programs offer on-site, in-person services and emphasize local needs assessment, effective use of existing resources, formative evaluation for program improvement, and local curriculum development and problem-solving skills.

The NETWORK also contracts with local school districts and other educational agencies to provide assistance in such areas as staff development, evaluation, management skills, career education, and the development of individualized educational programs (IEPs) for special needs students.

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